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UNIVERSITY OF ALBERTA

COMPUTER TECHNOLOGY, LEGAL SECRETARIES, AND THE LAW OFFICE: A CASE STUDY

BY

LYNDA MAE BOWES

A THESIS

SUBMITTED TO THE FACULTY OF GRADUATE STUDIES AND RESEARCH

IN PARTIAL FULFILMENT OF THE REQUIREMENTS FOR THE DEGREE OF

MASTER OF EDUCATION

DEPARTMENT OF SECONDARY EDUCATION

EDMONTON, ALBERTA

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THE UNDERSIGNED CERTIFY THAT THEY HAVE READ, AND RECOMMENDED TO THE FACULTY OF GRADUATE STUDIES AND RESEARCH FOR ACCEPTANCE, A THESIS ENTITLED COMPUTER TECHNOLOGY, LEGAL SECRETARIES, AND THE LAW OFFICE: A CASE STUDY SUBMITTED BY LYNDA MAE BOWES IN PARTIAL FULFILMENT OF THE REQUIREMENTS FOR THE DEGREE OF MASTER OF EDUCATION.

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Date: August 3, 1990

ABSTRACT

Legal secretaries' experiences using WordPerfect Version 4.2 software on a centralized and networked computer system in a large legal office setting were investigated. A desire to know the word processing workplace reality of practising legal secretaries prompted this qualitative study.

Three major themes evolved from the data: (1) the law office's word processing training policies and procedures, (2) secretarial electronic peer pressure, and (3) lawyers as clerical support.

Word processing training policies and procedures were technology oriented and process specific. The word processing training policies served as a vehicle to indoctrinate word processing secretaries with the law office's values and goals. The word processing training procedures were centered technologically on keystroke commands and did not teach computer concepts and principles.

Secretarial electronic peer pressure occurred when the centralized and networked computer system was used to share documents as precedents. Precedents that contained inappropriate keystroke routines caused time consuming, inefficient, and stressful revisions. This resulted in the original secretary-as-typist experiencing pressure to conform to the law office's standards. Pressure was applied by peer secretaries, by assistant trainer-secretaries called troubleshooters, and by the word processing manager. This procedure created a networked hierarchy of

secretaries who, rather than management, monitored and judged their co-workers' quality of work.

Lawyers act as clerical support when they word process. This study found that almost 9 per cent of the law office's lawyers used the word processing software to varying degrees. These word processing lawyers represent a trend towards administrative celibacy. By inputting material, drafting documents, revising text, and using computers for text-based tasks, formerly the responsibility solely of their secretaries, these lawyers have changed the traditional dynamics of the one-to-one lawyer-secretary team. The effect of this task reversal indicates that job restructuring could be eminent for law office employees, including professional as well as support staff.

Data collection included: (a) direct observation, (b) structured interviews with participant secretaries, (c) gathering of relevant documents and records, and (d) field notes. Data analysis included the creation of theme categories from cross-referenced data in the transcribed interviews and field notes.

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CHAPTER 1

INTRODUCTION TO THE STUDY

The role that legal secretaries play in a law firm is challenging, exacting, and demanding. As an instructor for 12 years in the legal secretarial program of a western Canadian community college, I often draw upon the experiences and knowledge gained as a legal secretary.

I was a practising legal secretary for 10 years and worked full time in a variety of law firms. While completing university, a further five years were spent as a part-time secretary for a number of lawyers. Four- to six-week intersession periods away from teaching duties at the college in 1978, 1982 and 1983 were spent in law firms updating legal secretarial knowledge and skills.

Notwithstanding this background of practical and instructional experience, I remained committed to ensuring that my perceptions of a legal secretary's job continued to reflect current workplace reality.

The Need for the Study

The instruction of legal secretaries is a specialized area of business education. Graduates of legal secretarial programs need up-to-date training and education in order to meet law firms' needs for competent, capable clerical support. Effective curriculum planning should ensure that trainees acquire appropriate job skills at a level of competence that serves them well in meeting law firms' current standards.

The 1980s saw the innovation and proliferation of computers in office settings such as law firms. Word processing software is making traditional office equipment, and some categories of jobs, obsolete (Chen & Regan, 1985). Many secretaries are experiencing profound changes in their work environment because of computers (Regan, 1984). The new technologies are transforming the very nature of clerical work, and word processing legal secretaries will be among those who are affected.

The term "secretary" can be defined many ways. As partly suggested by Murphree (1987), I use a definition that relates both to the social nature of the job (e.g., the superior-subordinate reporting relationship) and to the responsibility nature of the job (e.g., operating a computer). The focus of this study will be on the "word processing legal secretary." This is a clerical person who is assigned formally as support staff to one or more lawyers and is assisted through the use of a computer. This person is in daily contact with the lawyer or lawyers and performs some combination of computer-assisted clerical tasks (such as text and data entry, editing, or copying) and administrative or managerial services (such as gatekeeping, telephone reception, or letter drafting).

Computerized word processing has become a common law office phenomenon, and law offices require secretaries who are skilled in law office applications of word processing. Due to this cause-and-effect process, word processing training is a major component of legal secretarial curriculum.

Legal secretaries-in-training must learn word processing skills that are relevant and directly transferable to the law offices they will work

in. Course curriculum should reflect practising legal secretaries' word processing experiences and should address all current aspects of the computerized law office.

Purpose of the Study

The purpose of this study is to investigate and describe the current word processing reality of practising legal secretaries. Specifically, its purpose is to investigate legal secretaries' word processing realities after a centralized and networked computer system is implemented in a traditional legal office setting.

The Setting

I stepped off the elevator on the 25th floor and walked down the long corridor that led into the wood-panelled reception area of the law firm of Chase Bedford. For the next five months, this was to be the setting for a qualitative study on work practises of and training procedures for legal secretaries who use computerized word processing.

Description and Observations

The Law Firm and the Lawyers

Chase Bedford is one of the largest law firms in this Canadian prairie city of over one-half million people. Seventy lawyers and students-at-law and over one hundred support staff comprise a diverse law firm that handles all specialties of legal practice.

The firm moved to its present downtown site a few years ago to accommodate an increasing number of lawyers and clients. It occupies the top two-and-one-half floors of a large office tower. Appendix A is a computer-drawn representation of the layout of one of the complete floors

the firm occupies. Shortly after its relocation, a branch office was opened in the other large city in the province.

At the time of the move the lawyers felt that the firm's 15-year-old standalone word processing system was inefficient and obsolete. The system was slow and had a limited range of features. The word processors were not linked to each other, and each secretary owned and took sole responsibility for the documents that he or she created and revised.

One year before the commencement of this study, the firm installed networked video display terminals connected to a mainframe computer that provided access to various software packages. Chase Bedford chose WordPerfect Version 4.2 as its word processing software. The total cost of all the equipment and software was $2,500,000.

As part of the new computer system, Chase Bedford bought a software package called WordPerfect Management (WPM) which was then customized to meet the firm's requirements. WPM generates statistical information on WordPerfect word processing activity, and it also manages the WordPerfect system, performing functions such as routing documents into correct directories. All secretaries required training in WPM because they used it in conjunction with WordPerfect and could not operate WordPerfect unless they were proficient in WPM. Therefore, a word processing training center was established so that the firm could provide start-up training and on-going support for both WPM and WordPerfect.

<u>The Reception Area</u>

My first view of the firm was the reception area. It has a comfortable, prosperous air with its upholstered furnishings and thick

carpet. A striking ceramic sculpture is displayed prominently on the feature wall; oils and watercolours hang on the other walls. The receptionist sits at a functional, almond-coloured desk which contains the necessary equipment: computer terminal, telephone, and various and sundry office supplies. For those who are asked to wait, there is a handsome sofa and two matching side chairs. Magazines are arranged attractively on end tables. A small, brass cardholder that holds the firm's business cards sits on a low table in front of the sofa.

My impressions in quick succession were of order and calm; then, of financial strength, stability, and influence.

The receptionist smiled a genuine-seeming hello. I explained that I was here to see the firm's office manager, and she immediately dialled his number and told him I had arrived. He did not keep me waiting; in less than a minute he greeted me in the reception area and then led me on a tour of the office.

The Law Library

The law library occupies almost one-half of a floor and is so substantial it required extra reinforcing supports during the building's construction to carry the weight of the books. It contains legal reference material of every kind. There are study carrels and conference tables that provide space for legal research. A computer terminal provides access to a legal database, an on-line catalogue, and the word processing system. It also contains telephones, photocopiers, microfiche readers, and printers.

Boardroom and Lawyers' Lounge

The boardroom adjoins the lawyers' lounge; both are richly furnished. The boardroom is furnished with a massive, solid wood conference table and matching chairs. The lounge has original art works, leather sofas and chairs, and mahogany tables. A credenza in the lounge houses a large Sony Trinitron television set with both Beta and VHS video cassette recorders.

The lawyers' lounge kitchen has a microwave oven as well as a conventional/convection wall oven. There is a full-sized refrigerator and freezer. The sink is outfitted with a garburator and an instant-boiling-water tap. The countertops are grey marble, and there is a pass-through window to the bar in the adjoining lawyers' lounge.

Staff Lunchroom

The staff lunchroom seats 40 to 50 persons and is equipped with tables and chairs and has a kitchen area with a sink, coffee maker, microwave oven, and a small refrigerator. It is divided into smoking and non-smoking areas. Many secretaries do not eat their lunch here, preferring instead to snack at their desks or to go elsewhere during the lunch hour.

During my periods of observation in the firm, I never saw a lawyer of either gender eat a meal in this room, nor was anyone there who was not female and either a secretary, paralegal, legal assistant, mail clerk or library staff. While it is called a "staff" lunchroom, it gives the appearance of being a "female" lunchroom and, more specifically, a "female support staff" lunchroom.

Kitchenettes

Two small kitchenettes per floor contain coffee makers, microwave ovens, sinks, dishwashers, and small refrigerators. Water coolers containing purified mineral water have been installed recently, and the office manager reports that coffee consumption has decreased by one-half.

Service Areas

Service areas on each floor contain small photocopiers, fax machines, and character and laser printers. A state-of-the-art, high-speed copier, able to handle the considerable number of documents that the firm produces, is located on each floor.

The Mail Room

The mail room is equipped with automated mail-handling equipment of every design. Bookbinding apparatus enables the firm to soft bind lengthy court documents and other material.

Lawyer's Offices

My impression of order and substance was reinforced by the large, well lighted, and attractively--many expensively--furnished lawyer's offices. Partners and some senior level management occupy exterior offices with a window view. Associates and students-at-law most often get windowless, inside space. The practise of ranking and hierarchy seems apparent.

Other Offices

The office of the firm's office manager is furnished less grandly than those of the senior lawyers and represents the business-like decor found in many of the offices of the junior partners, associates, or other

management staff. The office manager has a walnut desk and swivel chair that are separate from a work area which contains a small, round walnut conference table and four chairs. The top of the desk displayed a few file folders, a calculator, and various binders and software reference manuals. A long walnut credenza stands behind the desk. Beside the credenza, a personal computer sits on a roll-type stand.

Secretarial Workstations

The secretaries sit in either one- or two-person wood-panelled workstations. The one-person workstations are located on the inside of the main hallway, abutting the interior offices. These workstations are set into triangular-shaped interior corners, occupying space that looks left over, as if nothing else would fit there.

The two-person secretarial workstations are situated at the outer edge of the main hallway and share a common wall with the exterior offices. They are 22 x 7 feet, rectangularly-shaped cubicles with a secretarial work area at each end. Some stations have an exterior window, in front of which sits a terminal. When working at their terminals, the secretaries sit with their backs to each other, separated by 8 feet of storage cupboards along the common wall. Access to the area is through a midpoint break in the low, hallway-facing wall.

In each separate work area there is a computer terminal, keyboard, steno chair, file folders, and other office supplies. On each of the two sections of low wall bounded by the hallway there is a work counter with a narrow bank of storage drawers underneath that allow knee space while working at the counter. Cupboards with sliding doors have been built into

the secretaries' side of the common wall and are used for file storage. Sitting space when facing the terminal is located between the counter on one side and the cupboards along the common wall opposite. This area is 3 feet wide.

The hallway-facing wall of both types of workstation is 4 feet high. The largest measure of privacy is provided when the secretaries are sitting: they are then visible only from the neck up.

The secretaries are divided in their opinion of these workstations. Some like them; others do not. In response to my casual comment that I thought the offices in general looked well laid out and pleasant to work in, one secretary quickly retorted, "Our work areas are too small. There's no room along the one side to store anything and it's all so cramped." Some weeks later, another secretary, citing the reasons she likes working for the firm, referred to the work area, saying, "It's very efficiently set up and great to work in because everything is at my fingertips." On my initial tour of the firm, when we walked past one of the two-person workstations, the office manager revealed that when the firm moved in, the lawyers realized the "elbowroom" in the workstations was too narrow, adding, "It was too late then to do anything about it."

Word Processing Manager's Office

The word processing manager's office adjoins the word processing training center via a doorway. Both areas are located on the one-half floor the firm occupies. Her small office contains a desk, a terminal and keyboard, a telephone, a credenza that stores word processing reference manuals and miscellaneous files, two chairs, and a three-drawer filing

cabinet. There is barely room to walk around. Its outer wall, floor to ceiling glass, faces onto the main hallway. Vertical shades give some privacy; however, unless they are shut tightly, closing in the office even more, anyone walking by can see what the word processing manager is doing, or to whom she is talking.

Word Processing Training Center

The center is bordered by the word processing manager's office and the adjacent computer room on one side, by the reception area on another, and by the central hallway on the third. The center is roughly trapezoidal in shape (see Appendix B).

Three doorways lead in or out of it. The handsome, walnut-finished main door gives access to or from the outer hallway, and it has an 8 x 6 inch embossed brass plate bearing the inscription "Word Processing" affixed to the right of the doorknob on the outside. As the words are not at eye level, they are hard to read unless one is kneeling.

The second doorway, located on the inside wall of the center, leads into the word processing manager's office. Beside this door, a third doorway leads to the temperature- and humidity-controlled room that houses the central processing units of the mainframe computer. When systems' personnel and computer technicians require access, they do so via the training center.

The word processing training center contains three terminals networked to the mainframe computer. Each terminal has a keyboard attached to it. The terminals are set on an L-shaped, typing-height counter that runs the length of the room and across the far wall. An

optical character reader sits between two of the terminals. Four or five steno chairs are pulled up to the counter in haphazard fashion.

A bulletin board with sign-up sheets for special-interest training is located on the wall opposite the terminals. A small whiteboard for illustration and instruction is attached in its lower right quadrant. This whiteboard is located behind the trainees when they are seated at the counter and facing the terminals. Word processing training manuals needed to orient and update staff on word processing procedures, as well as other office supplies, sit on narrow shelves above the counter.

The center is small. When occupied by the word processing manager and three trainees, the air quickly becomes heavy. When six trainees share the three terminals, as happened in the supplementary training classes I observed, the center is cramped and movement limited. Then the temperature soars and the heat is stifling.

WordPerfect Software Version 4.2

A key feature of the setting is the WordPerfect Version 4.2 software used by each secretary to accomplish the daily workload of document creation and revision. The combination of power and range of functions have given WordPerfect the lion's share of the software market. It presently holds a decisive lead, with total sales of 140,000 copies a month (Mendelson, 1989, p. 98). WordPerfect is compatible with and can be found on a variety of computer systems from the Macintosh to the Amiga, Atari, VAX, IBM 370, and on OS/2 and Unix machines.

WordPerfect is considered a full-featured word processing software. This means that it includes programmable merges and macros, sorting and

math functions, a speller and thesaurus, hyphenation, footnotes and endnotes, outlining, automatic cross-referencing, multilevel tables of contents and indexes, document summaries, snaking and side-by-side columns, and file-management functions.

It also has special functions found useful by lawyers including line numbering, redlining and revision marking, compilation of tables of authorities, and password protection.

It is a sophisticated software that combines speed and ease of use. It makes basic functions, such as document creation and revision, simple to do. The software is easy to learn and operate at a basic level, but it is more intricate to operate when complex functions are needed. Then, some conceptual knowledge on the part of the user is advantageous.

Summary

The setting of the study is complex and diverse. Unabashed luxury is juxtaposed with functional austerity. Rank and privilege are apparent. The players in the law firm range from lawyers who have at least two university degrees to some support staff who may not have finished high school. Whatever the educational level, most staff seem to share the corporate goals of service to the client and profit to the firm.

The participants in the study let me observe their working life. I saw the essence of some of their word processing experiences during the time I spent with them. This study discusses and reflects upon some of the issues that were identified through this process of observation and investigation.

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CHAPTER 2

THE RESEARCH METHODOLOGY

Primary Research Methodology

The study of word processing experiences of legal secretaries in a law firm was conducted using qualitative research methodology. Qualitative research attempts to construct, through direct participant observation, a concept of the functioning of a particular culture as closely as possible to the way the members of that culture see it. The purpose is to understand reality from the point of view of the participants. As Sapre quotes Bogdan and Taylor (1975):

> Qualitative methods allow us to know people personally. . . . We experience what they experience in their daily struggles with their society. . . . They enable us to explore concepts whose essence is lost in other research approaches (Sapre, 1981, p. 24).

I felt that the choice of a qualitative study was important in order to address fully the individual nature of the secretaries' reactions to the word processing software they were using. A qualitative research paradigm draws a richness of information and a deep level of understanding from the observed participants. This research method was chosen because it produces an intimate chronicle of a person's experiences.

Research Design

A Change in Focus

During the preliminary stages of the study, the purpose of the research was to investigate how changing a firm's computer-based word processing software had affected the legal secretaries. In the first period of data collection related to the secretaries' interviews, it became obvious that more central themes were emerging which minimized the software changeover theme. Further interviews revealed the changeover process to have ended. Reconstruction of this experience, after the fact, would have been difficult. More importantly, it would have been hard to judge the validity of the secretaries' reconstructed experiences.

Early in the initial data gathering phase of the study, a central theme relating to the experiences of legal secretaries using the computerized word processing in the law firm began to emerge as a more relevant topic. Rather than studying the change process, there was a shift in focus to study the secretarial experience of working in a "recently changed" environment which included a different word processing software.

Site Choice

The law firm of Chase Bedford was chosen because it offered a large population of legal secretaries who used electronic word processing. Specifically, the firm used video display terminals connected to a mainframe computer and networked to each other.

The large number of secretaries at this firm added a broad perspective to the study which might not have been possible to achieve in a smaller firm with fewer secretaries. It was felt that the ability to

generalize the findings to other legal secretaries and to other law firms would not be affected adversely by the large secretarial population at Chase Bedford. Collectively, Chase Bedford's secretaries had a variety of experiences that a smaller secretarial population in another firm may not have had. As well, because of Chase Bedford's size, it had the resources to offer on-site word processing training and support, such as a word processing manager who performed a formal training function. Taken together, these considerations allowed me to study a firm that was attempting to bridge the gap between institutionalized, formal instruction on the one hand, and unsupported, self-taught learning on the other.

Site Accessibility

Burgess' (1982) site accessibility criteria formed the basis for analyzing the suitability of this site. Of importance were:

1. My formal request for research ethics approval of the study, subject to conformation under the provisions contained in the University Policy Related to Ethics in Human Research document, was received from the University of Alberta, Department of Secondary Education.

2. My formal request for open access to the site was approved by the law firm's governing partners.

3. The office manager stated that he was in favour of the study. He provided general site access and approved information release.

4. The site met my substantive criteria and requirements by providing a rich social and technical context. There were over one hundred secretarial support staff and this population size provided abundant social detail. The technical aspects relevant to the study were satisfied by on-site equipment.

Site access occurred during a five-month period from October 4, 1988 to February 17, 1989.

On-Site Relationships

The Office Manager

One of the participants in the setting was Lawrence, the office manager, incumbent in this position for two-and-one-half years. Lawrence came to Chase Bedford with self-assurance from experience gained working for and managing other large law firms in the province. Along with his Bachelor of Commerce degree, his knowledge of law office management was useful to Chase Bedford in the acquisition and implementation of the new computer system and software. The secretaries I spoke with and observed over the duration of the study always referred to him with respect; many with outright warmth. In addition to his managerial duties, Lawrence had a family and actively supported his community by membership in service groups.

I knew Lawrence for approximately 10 years, during which he had been a guest speaker in my legal secretarial classes on the topics of secretarial professionalism and law office hiring requirements. For the past six years, he served as a voluntary member of the legal secretarial advisory committee for the community college where I instruct. He also asked me for references when interviewing the program's students for hiring, and upon his recommendation, the firm had hired approximately 10 graduates from the legal secretarial program.

Through this association, I knew that Lawrence had orchestrated a large-scale computer change in the firm, and I felt that there were unique aspects of this process that merited further study. Also, our long-term professional relationship might encourage Lawrence to be more open with me, thus adding to the richness of the data.

Conversely, there was also the potential for bias inherent in such a relationship. In an attempt to maintain the rapport within our professional relationship, it was possible that analyses of data could be skewed to reflect a desired outcome. This possible trap was avoided by advisor consultation, personal reflection, and careful corroboration of data through multiple sources.

In addition, as Seiber (1982) suggests, there is a common danger to avoid in the form of an "elite bias" that occurs in the selection of informants and in the evaluation of their statements. Elite bias results when a researcher feels gratitude or misplaced commitment towards an influential person in the setting, such as a gatekeeper, a person who controls the researcher's access to the site. The researcher could attempt to keep on good terms, thereby losing independence from the informant. This could constrain the researcher and could colour objectivity.

Initial contact with the gatekeeper office manager was necessary to ensure access to the other participants. However, due to Lawrence's articulate manner, he gave the impression of being better informed than they were. There was a risk, then, of believing Lawrence to possess more valuable knowledge than other participants, thereby enhancing inappropriately his qualification as an informant.

Bias was avoided by advisor consultation and by being open to alternative explanations and theoretical constructs. Awareness of the potential for bias was a major consideration throughout the data collection and analysis stages of the study.

The Word Processing Manager

Preliminary field work identified a further source of information. Lawrence suggested that Joanne, the word processing manager, would be a "good person to talk to." Joanne, a former legal secretary of the firm, was the word processing manager in charge of word processing coordination and training. She worked for a number of years as a legal secretary in other law firms in the city and had been at Chase Bedford over five years, one and one-half as word processing manager. She said that when the firm created the position of word processing manager she knew she really wanted the job. She felt she was ready for a change. Joanne said she wished she had time to take classes and courses in office administration to augment her grade 12 education, but her teenage children kept her too busy. She was a quiet, extremely reserved person.

In her dual role as word processing manager and main word processing trainer, Joanne's responsibilities included teaching the firm's introductory word processing training course to newly hired secretaries and to other staff, such as lawyers, who wished to use the word processing system. She was also responsible for supplementary word processing training for the secretarial staff. In addition, she was expected to provide general and on-going word processing consultation and support to all staff.

Joanne's contribution to the study was valuable because of her central involvement in the firm's word processing; she had explicit knowledge of the secretaries' training and work situations because of it. Her role as word processing trainer and coordinator had also given her an extensive amount of technical information regarding the computer system.

I observed Joanne teach a two-and-one-half-day introductory training session for newly hired secretaries and 2 one-half-day supplementary training sessions. She was also observed on an informal and casual basis during several periods I spent in the training center when formal classes were not in session. It was possible to see into her office from the training center and observe her perform her word processing management role, which was distinct from her training role.

It was necessary to assess the potential for bias in this relationship. The fact that the office manager recommended her brought a degree of his control into the setting. Since Joanne was in a direct reporting position to Lawrence, it was possible for her to feel she was being told by him to take part in the study and that this was something she had to do. This could have meant that she would be reluctant to share information she felt was detrimental to her status or performance, or threatening to the firm in general. Data collection had to include Joanne, however, because there was only one word processing manager, and I felt it was likely her contribution to the data would be significant and provide information regarding the practical coordination of the firm's word processing. Accordingly, analysis of information from Joanne was scrutinized with these particular biases in mind.

Selection of Secretarial Informants

In addition to Lawrence and Joanne, seven legal secretaries were interviewed. These participants were chosen on a random basis, with attention given to their qualifications and experience to avoid bias due to commonality. I looked for participants who had a range of computer training and work experiences, including:

1. secretaries who had been with the firm before WordPerfect was introduced and had experience with both the former standalone word processing system and the new networked system, and who could provide information that compared the two types of word processing;

2. secretaries who were recently hired and had used only WordPerfect at Chase Bedford (their experience of learning and using WordPerfect exclusively would provide a contrast to those secretaries who had been required to forget the old system and learn the new one);

3. secretaries with a range of legal secretarial experience; namely, those who had over five years of experience in the field and others who had less than five years of experience; and

4. secretaries who were also word processing troubleshooters as their troubleshooting experiences and expertise would add another level of information to the data.

I felt these criteria would provide a broad range of secretarial experiences and information.

Two participants were chosen from the introductory word processing training class I observed. One had a limited knowledge of WordPerfect when she came to Chase Bedford, and the other participant had no prior knowledge of WordPerfect. Both participants had no previous experience with the firm's word processing policies and procedures and could, therefore, add a fresh perspective to the data.

The other five participants were recommended by Joanne, the word processing manager. Initially, this method of selection was of concern to me due to the potential for management control of the information, but I found after interviewing all of the participants a diverse range of qualifications and experience that fulfilled the selection criteria. Three of these participants had legal secretarial experience at Chase Bedford that ranged between 10 and 15 years. Two were troubleshooters,

and all three displayed a thorough level of system knowledge and word processing skill during either the advanced training session or field visits where I observed them. The other two were younger participants who had been with Chase Bedford less than five years but were experienced WordPerfect operators. One was a troubleshooter and had joined Chase Bedford before the conversion to WordPerfect; the other arrived after the conversion.

The variety of responses I received throughout the interviews with these five participants further removed any concerns regarding potential bias introduced through this form of management control.

In particular, one participant interviewed was a former colleague. I was interested in interviewing her because, in addition to a Bachelor of Education degree, she had experience teaching word processing to adults. Any element of bias that she may have introduced because of our former professional relationship was eliminated by cross-referencing the data she supplied with those of the other participants. Except for this participant's somewhat broader perspective on the issues raised, no inconsistencies between her responses and the others' were found.

Data Collection

The primary forms of data collection for this study were direct, on-site observation; structured, formal, participant interviews using a common, pre-set interview guide; gathering of documentation and records; and field notes.

The principles underlying data collection from all sources were: multiple sources of evidence, creation of a data base, and maintaining a chain of evidence (Yin, 1984).

Direct, On-Site Observation

Direct observation occurred during a five-month period. I observed a two-and-one-half-day introductory training session for newly hired secretaries and 2 one-half-day supplementary training sessions. Observation also took place throughout each field visit. Appendix C is a schedule of field visits.

This method of data collection provided for further understanding of the technological context of the study. For example, during a period of observation spent in the training center, the field notes record:

> During this time I sat and read the training binder. I noticed that the keyboard function keys have no numbers on them. The template sits above the function key row and is held in place by a couple of clips, so in order to press F7, for example, one must locate the printed word "F7" on the template and then drop one's gaze to the key below. Therefore, it is hard to recognize the correct key at a glance. Also, the template is a photocopy and is not colour coded as is common for vendor-supplied templates.
>
> This means that the ctrl, alt, and shift key manoeuvres that occur in unison with the top row function keys are made more difficult because of the lack of colour-coordinated references. Many templates are not colour coded, I suppose, but I do know that WordPerfect does colour code its templates for ease of reference. Why doesn't the firm use colour-coded templates?

This observation was followed with a search for evidence from Joanne and the participants to determine if it had validity. Questions such as, "What is your evaluation of the keyboard?", and "How long did it take you to learn this keyboard?" explored this area. Direct observation added significantly to the study, and it helped identify meaningful characteristics in the data. Observation also added descriptive evidence that was useful in data analysis.

Participant Interviews

In-depth, focused, tape-recorded interviews were conducted with the participants using a pre-set interview guide. Appendix D is a schedule of the participant's interviews. A pilot guide was derived from a literature review, personal experience, and an open-ended, informal interview each with the office manager and the word processing manager. The pilot guide was used in the first participant interview, and revisions were made to it that were based on an analysis of the topics and issues that arose. The revised interview guide was then used for the remaining interviews. Each participant was interviewed for approximately one hour in a conversational manner, and the guide was used only as an informal agenda and a checklist. It was felt that a relaxed, conversational approach would encourage each participant to provide fresh commentary. Appendix E shows a sample interview guide.

Each tape-recorded interview was personally transcribed using a transcription machine, a personal computer and WordPerfect Version 5.0 software. I found that analysis occurred spontaneously during the transcribing process. Through the use of the software's "split-screen" feature, I was able to leave the transcript-in-progress document temporarily and record my impressions, questions, or reflections in an analysis-of-transcript document that I created for each interview and field note. The split-screen feature allowed me to display both documents simultaneously, one at the top of the screen and one at the bottom. I could alternate easily and quickly between the two documents, adding, moving, or copying text.

Spontaneous analysis occurred as I listened to a participant's comments and typed the transcript. For example, if I remembered verifying data from other sources, such as interviews or field notes, an electronic word search could be performed throughout the electronically stored data. I could then transfer any references into the analysis-of-transcript document, as I created it, and make reference to each source. Cross referencing in this manner added substance to the data base.

The transcripts were analyzed to identify general themes and related topics. I listed theme categories, topics and issues, as well as personal reflection and commentary in the wide, left margin of the hard copy transcripts. Appendix F shows a sample page from an annotated interview transcript.

As Yin (1984, p. 85) suggests, "informant interviews are subject to the pitfalls of bias, faulty memory, and poor or inaccurate articulation." These hazards were offset by validating the data with material from other informants and by transcribing accurately all interviews from the original tape recordings. My technical skills, both as a legal dictatypist and an instructor in the subject, were useful in providing transcription accuracy.

Documentation and Other Records

Documents and other records were plentiful at this site. These included memoranda relating to the changeover, vendor-produced literature specifying the physical characteristics of the hardware, training manuals produced for use by the secretaries, a diagram of the layout of each floor of the firm, communiques, and other internal documents. This information was relevant to the study and provided evidence that verified and

supported the other forms of data. The firm indicated that, for research purposes, the researcher could photocopy any documents.

Field Notes

Field notes consisted of observations, impressions and reflections, documents and other records, on-site jottings, and photographs of the setting. Computer-generated field notes were created on a personal computer using WordPerfect Version 5.0 software from handwritten on-site notes and from memory. Thematic interview data, drawn electronically from the transcripts, were included and cross referenced in the field notes. As well, subjective feelings and impressions were added. The field notes and interview transcripts were stored on hard drive, and floppy disks were used for supplementary storage insurance.

The field notes were then further analyzed and margin annotations made to headline specific themes or major issues, as well as personal reflection and commentary. Appendix G shows an sample page from an annotated field note. These field notes form part of the overall data base because they link data collection, formal and informal theorising, and data analysis to the final research report (Burgess, 1982).

Principles Underlying Data Collection

Principle 1: Multiple Sources of Evidence

A major strength of the case study approach is the opportunity to use many sources of evidence. Credibility of research findings in general is heightened by the development of converging lines of inquiry, and a process of triangulation (Yin, 1984). Triangulation is broadly defined as "the combination of methodologies in the study of the same phenomenon" (Denzin, 1978, p. 291). In qualitative studies, Denzin labels this kind

of triangulation as the "between (or across) methods" type (p. 302). Jick asserts that triangulation "is largely a vehicle for cross validation when two or more distinct methods are found to be congruent and yield comparable data" (1979, p. 602). The dependability of this study's collected evidence was increased through the use of overlapping techniques, such as triangulation, that cross check the data. The study's findings and conclusions were then considered more convincing because they were based on multiple sources of information.

For example, preliminary field work indicated that Joanne, the word processing manager, felt unsure of how much longer her position would be needed now that the new system was up and working. During a supplementary training session, Joanne responded to a trainee's comment that she (the trainee) hated to bother her (Joanne) by asking for help with (a laughingly), "Please, call me! If you don't call me, they'll think they don't need me, and they'll fire me!"

Lawrence's interview of the following week included the comment, "You know it's funny, both Joanne and Lisa (the word processing manager in the branch office) indicated to me, 'Well, what's going to happen once this thing gets up and running? I don't think I'm going to have enough to do.' I said, don't worry, you'll always have enough to do."

Comparison of these statements revealed the word processing managers' concern for their jobs and the office manager's parallel awareness of their concern. Also, the commonality of their type of apprehension was borne out in the literature. These three findings illustrated and reinforced a general tenet that computers in the workplace lead to fear of job obsolescence for many clerical workers. Lawrence's

statement indicated he was aware of and sensitive to the word processing managers' concern. However, he did not address the alternative possibility that someday there may not be enough for them to "do," or indicate what would occur in that event. The conclusion they could draw was that their jobs would then be eliminated. Other informants and sources of evidence were studied regarding this finding searching for an enduring pattern. Multiple sources of information and evidence were used in this manner throughout the study.

Principle 2: Case Study Data Base

The organization and documentation of the collected data produced a data base which was used during the data analysis stage. Due to its computerized nature, it is a formal, retrievable data base should other researchers desire to review it.

Principle 3: Chain of Evidence

To increase the reliability of the information presented, a chain of evidence was maintained. This principle allows an independent observer to trace the sources the researcher used by the presence of specifically cited interviews, documents, or observations (Yin, 1984, p. 96). This study makes sufficient citation to the appropriate sections of the data base that a reader could locate the cited or quoted material within it. The process of collecting the data was made as explicit as possible to demonstrate a commitment to construct validity and reliability.

Data Analysis

General Analytic Strategy

Data analysis involved drawing information from the documents and other site-obtained records, as well as the interview transcripts and

field notes. In-depth analysis of this information led to the identification of major themes and was achieved, in part, by electronic word searches that identified cross-referenced data. Thematic coding categories were then established based on commonalities that occurred throughout the data base. Data in the participants' comments and field notes were electronically sorted, classified, and further cross referenced based on the established thematic categories. Both a hard copy printout and an electronic disk file of the data comprising each theme were created. The findings in this study were then written from the themes and topics that emerged. During field observation, three scenarios presented themselves that capsulized the identified themes. Each finding chapter, namely Chapters 3, 4, and 5, has one of these scenarios as its preamble.

Researcher's Neutrality

While conducting the field research I became concerned about my capacity to be a neutral observer. Legal secretaries are the main unit of analysis of this study. Because of my personal experience as a legal secretary, my allegiance to the secretaries could have affected the impartiality of the study. Accordingly, this risk was addressed by advisor consultation and debriefing, by strict adherence to the data verification procedures outlined above, and by developing relationships within the law firm on the basis of participants and researcher and not on the commonality of being legal secretaries. I had no prior knowledge about the perceptions of the individual participants relevant to word processing in this setting and, therefore, no vested interest in colouring their disclosures.

Exit from the Field

As part of the study, consideration was given to the issue of exiting the field. It was anticipated that after completion of this study I would continue to be involved with Lawrence on the previously-mentioned college advisory committee and in the hiring of the program's graduates.

There was also an ethical concern because the study and its final report should not be seen from the office manager's perspective as a vehicle for justifying his policies, or touting his abilities to the managing partners. Neither must it be seen as a diatribe against management in favour of the secretaries, or as a method to predispose the firm to hire the program's graduates. I found myself walking a very fine line between these and other potential biases.

In withdrawing from the study, a commitment was made to prepare a version of the report for the participants. This feedback could reinforce the participants' feeling of having contributed to the study.

Summary

This qualitative study used a variety of research methods. A review of literature pertinent to the study was conducted. Data was collected by direct observation, by in-depth, focused interviews, by gathering documents and records, and by field notes. Data analysis included the identification of theme categories from cross-referenced data in transcribed interviews and field notes. The findings were then written from the theme categories and topics that emerged.

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CHAPTER 3

WORD PROCESSING TRAINING AT CHASE BEDFORD

Scenario 1 - The Introductory Training Session

Day One

I arrived shortly before 8:30 a.m. to observe the firm's introductory, two-and-one-half-day word processing training session. Introductory word processing training was taught by Joanne in her dual role as the firm's word processing manager and principal word processing trainer. The sessions were designed for newly hired secretaries and any lawyers who wished to use the system. Secretarial attendance was mandatory regardless of a person's existing level of word processing experience and expertise. The training curriculum provided an introduction to WordPerfect Version 4.2 and WordPerfect Management (WPM). The root software package seen first on the screen was WPM, the computer system's software package that monitored and controlled all activities on the terminals, including word processing on WordPerfect. WordPerfect and WPM ran in concert; documents could be produced in WordPerfect only by interacting with WPM.

I was the first person to arrive. Joanne was on the telephone in her office adjoining the center. She came out in three or four minutes and told me that I would not be able to sit at a terminal today because she had three trainees and only three terminals. She said I could sit beside one of the trainees and look on.

In a few moments the three trainees came in and Joanne introduced everyone. Bill was an articling student in his mid-twenties; Tracey, a secretary in her early twenties who had limited experience on WordPerfect; and Lynne, a secretary in her mid- to late-thirties who had no experience with WordPerfect but had worked for many years on a variety of equipment including electronic typewriters and standalone word processors.

The session began as soon as everyone chose a terminal and sat down at it. Joanne gave each of us the training manual. As she wrote the day's agenda and timetable on the whiteboard, we swivelled around in our chairs to see what she had written. The timetable we were to follow was:

8:30 - 9:45 a.m. - training
9:45 - 10:00 a.m. - coffee
10:00 - 11:45 a.m. - training
11:45 - 1:00 p.m. - lunch
1:00 - 2:30 p.m. - training
2:30 - 2:45 p.m. - coffee
2:45 - 4:15 p.m. - training

She asked that we open the training manual to page 1 and look at the heading, "What is Word Processing Management?" The trainees turned back to their manuals and started to read. While everyone was faced away from her and absorbed in the task of reading, Joanne started her lecture on the benefits of WPM. She continued her information presentation by asking everyone to turn to the material on pages 2 and 3 entitled "Create a New Document Master" (see Appendix H), and she resumed her explanation of WPM.

Chase Bedford used an American, vendor-supplied, 20-lesson WordPerfect tutorial package as part of its training manual. The lessons were designed to teach the WordPerfect features, and they progressed in

level of difficulty from the most basic features through the most intricate. The material was written for self-paced, hands-on learning. Each software feature was presented using explanatory text followed by an exercise that the trainee must complete using the software, the terminal, and the keyboard. The objective was to learn through reading and then reinforce the learning by "doing."

Joanne asked each trainee to read through the lessons, starting with the first, and to perform the requested keystrokes when and where instructed in the manual. The trainees were told that they could proceed at their own pace, but she set rough timelines for accomplishing each lesson. They were told that the goal for Day One was to try to complete lessons 1 to 10.

Everyone complied and soon the atmosphere became one of quiet concentration, broken occasionally by Joanne's soft-spoken answer to someone's question. She frequently called everyone's attention to the whiteboard and illustrated some aspect of the software theory or some practical application related to it. As the trainees worked through the WordPerfect lessons, they practised such tasks as creating a short, simple letter, revising and then deleting a document, and exiting the system.

Joanne incorporated WPM theory into each WordPerfect lesson by requiring the trainees to create a WPM document master and to perform other WPM functions simultaneous to using WordPerfect. By early afternoon of Day One, every time a WPM function was used, each trainee was expected to jot down on a piece of foolscap the keystroke routines needed to perform that function. Joanne told them that in this way they would

create a personalized set of notes and lists of WPM keystroke references that would be invaluable on the job. There was a vendor-supplied WordPerfect Quick Reference guide located in the tutorial lessons, but the trainees were expected to create their own quick reference notes for WPM.

For the remainder of Day One and up to noon of Day Two, the trainees learned WPM features such as the inquiry menu, the document master, the list of directories, and the user-defined directory. Each new WPM feature that the participants tried resulted in another set of notes and another list of keystroke sequences.

Lynne, white faced and tense, tried to write notes as quickly as she could. Often, while she was writing, the terminal beeped to let her know she had delayed the next keystroke too long. The software then forced her to go back a screen or two and start again. The other two trainees seemed able to manage the concurrent note writing and screen entries, but I did not have an opportunity to determine the quality of their notes.

The training throughout the introductory session was software specific and process oriented. The pattern consisted of listening to Joanne's lectures, reading the manual, doing the lessons, and writing notes on the WPM keystroke routines. The trainees worked in a loosely self-paced fashion while Joanne periodically called order and redirected their attention to the next WordPerfect lesson or the next WPM feature. When this occurred, Lynne often had not completed the WordPerfect lesson she was working on, but she turned to the new material without saying anything. This study pattern continued until the end of Day One.

Interruptions from other staff members were common. For example, during an involved phase of the training, a woman walked through the center and into Joanne's office and left a document on her desk. Joanne stopped her lecture and smiled. "Thanks, Margaret," she said. Another time, Lawrence quietly opened the center's main door, smiled at Joanne, and stuck a yellow Post-it note with a message on it to the doorframe. At other times, the receptionist slipped through to Joanne's office to leave pink telephone messages on her desk. On yet another occasion, Joanne suddenly stopped her explanation of some aspect of WPM and looked through the doorway to the secretary who was sitting across the hall. Joanne asked, "Penny, are we too loud?" Penny said no, that she was off to somewhere else in a minute, and not to worry. Nonetheless, Joanne shut the door in spite of the fact that a large desk fan was trying valiantly to reduce the stifling heat in the room.

Throughout the trainee's questions and interruptions, Joanne appeared patient, approachable, and even tempered. She smiled a great deal and had a humorous reply wherever appropriate. Her comments of, "That's a good idea!", and "Please call me!", and "Absolutely!", reflected friendliness and support towards the trainees.

In spite of Joanne's positive manner, Lynne appeared anxious. She spoke very little, except once to say quietly to Tracey sitting at the terminal next to her, "I feel so lost." She asked fewer questions than the others, and when she did, it seemed out of absolute necessity. By contrast, the others seemed more at ease in the training setting. Though intent upon completing the training lessons, they asked questions

spontaneously, appeared more relaxed than Lynne, and made casual comments from time to time.

Day Two

After writing the day's agenda on the whiteboard, Joanne began with a question-and-answer session that reviewed Day One's instruction. She then devoted a large portion of time, over an hour, to a new topic: system macros. Macros provide a means of automating often-used features by chaining together the numerous keystrokes commands that are needed to employ a feature, or a series of features. Pressing one simpler command triggers the running of the macro and expedites software performance. For example, frequently used tasks involving format setup and creation, envelope choice, or paper length changes, can be accomplished more quickly and efficiently using macros. Macros covering all manner of keystroke manoeuvres had been created and electronically stored on the system by Joanne for use by Chase Bedford's staff. The complexity of this topic, and of macro manipulation itself, took over an hour of explanation and training.

After the topic of macros had been covered, Joanne introduced laser printer operation, font changes, and the "reveal codes" feature. She also reviewed document directory routes through WPM. The morning's activity centered around her instruction, and this left little time for the trainees to work on the self-paced WordPerfect lessons.

At 11:00 a.m. Joanne introduced more WPM; specifically, the "Document Inquiry by Typist" screen. She told everyone to call up this screen so they could see a list of the names of the documents they had

created during the training session. She asked them to list these names on a piece of paper and then, using it as a checklist, to delete the documents from the system.

Before they could start the deletions, Joanne asked everyone to print a particular document. Bill and Tracey were able to do this quite quickly, but Lynne took some time to input the print commands correctly. The laser printer they used was situated outside the training center, across the hall. This printer was also used by two secretaries adjacent to it. Due to its location, each time the trainees printed a document, they had to leave the center to retrieve it. They also had to wait while the resident secretaries' documents were printed. These delays used up almost all of what remained of the morning.

Before allowing the trainees to carry on and delete their training documents, Joanne announced that each trainee would be creating a training binder that was to include the self-paced WordPerfect training manual supplied on Day One and their handwritten notes and quick reference lists of WPM keystroke routines. She told them that the training binders required section markers, and she dictated the section marker labels first to Bill and, later in the afternoon, to Tracey and Lynne, each in turn. She gave each trainee a large, yellow 3-ring binder and said, "In the future, I will be putting everything in the yellow binders with tabs already set up. It was so busy this past year that I haven't been able to do that, but now it's slowed down and I should be able to do that from now on." Joanne gave everyone a set of insertable tab indexes and instructed them to print the section labels on the tab inserts and

assemble the binder after they were at their work stations and "on the job."

Tracey and Lynne spent the remaining 15 minutes before the lunch break deleting their training documents from the system. Bill delegated the task to Joanne and left to return to his articling-student practice of law.

As we broke for lunch, Tracey and Lynne began talking about how happy they were to have been hired. Lynne said the firm's benefits were "really substantial" and that health benefits included all health care payments, dental, and eyeglasses, and covered the whole family. She also said that the wages were higher than average. Tracey replied, "That's for sure!"

After lunch Joanne gave Lynne and Tracey review exercises and asked that they work through them for extra practise. She said the "notes that everyone made yesterday will be essential because the WPM training manual notes are not sufficient for following through the steps to create and print a document." Joanne said she would be in her office doing work, but if anyone needed her, she would be right out. She said this approach was best so people would not feel she was "looking over their shoulder." She also said, "It'll be better when you get back to your desk. When you're not nervous and pressured, it'll fall into place. Everybody is doing wonderful!"

For the next hour and a half, I observed that while Joanne was in her office, Lynne asked questions only of Tracey. Neither would call

through to Joanne. She had to leave her office for some other reason before either would ask her a question.

While Joanne was in her office, she was busy answering her telephone, making calls, and working on files. During the time that the trainees were left on their own, Lynne asked Tracey many questions and seemed to need reassurance. She would ask questions such as, "How did you do this?" "Is it okay if I do that?" Tracey answered her questions with short, simple statements that did not appear to give Lynne the reassurance she sought. Lynne remained quiet and grim faced. Occasionally, Joanne came out of her office and entered into the exchange. Tracey did not ask Lynne any questions; but she answered Lynne's queries with patience and good humour.

Tracey, by contrast, was able to complete the review exercises and print the work very quickly, and she asked Joanne for supplementary practise as soon as she had finished the initial exercises.

Both Lynne and Tracey appeared very frustrated when the macros did not produce the right number of copies or the requested envelope. They had difficulty running the macros and, rather than calling Joanne from her office, they entered keystrokes over and over in an attempt to produce the desired result.

At 3:30 p.m., just after the coffee break, Joanne came out of her office and told Lynne to meet her in the training center the next afternoon at 1:00 p.m. for the final one-half day of training. She told Lynne that they would spend the afternoon reviewing anything she had difficulty with. Lynne replied, "Well, that's just about everything."

Joanne chuckled and told her, "Be patient. You'll understand it, trust me!" Lynne did not look as confident as Joanne. Tracey was told that she was to go directly to her work station the next day and begin her job.

Tracey asked a question regarding E-Mail (electronic mail), and Joanne responded by showing them how to send a message via their terminals to hers. Lynne and Tracey seemed to enjoy this feature as they smiled and laughed a lot during the demonstration. Joanne recounted an anecdote about a secretary in the firm who sold jewellery as a sideline. This secretary decided one day to bring in her stock, and she sent an E-Mail message to everyone who was on-line. The message read, "Stop by my desk and bring money." We all laughed, and Joanne said, "If you can't have some fun on the job, you may as well not be there." This set the tone, and for the next few minutes we all chatted and relaxed. As we prepared to leave, we all wished each other good luck. Lynne told me to come and interview her after she stopped being "so slow and so dumb." I told her that I didn't think she was either slow or dumb, and I found myself wishing she had not said that because, although she meant it honestly, it injected a note of despair into what otherwise would have been a positive departure. I gave her and her comment a great deal of thought over the remainder of my study.

Word Processing Training Personnel

I found two distinct levels of word processing training at Chase Bedford; formal and informal. Formal training was conducted by Joanne, the word processing manager, in her alternate capacity as principal word processing trainer. Her lieutenants, referred to as troubleshooters, were

also part of the formal training structure. Informal training occurred between and among secretaries by peer tutoring and by word of mouth.

Formal Word Processing Training

The Word Processing Manager

Joanne was directly responsible for the firm's word processing training of secretaries and lawyers. She also trained the troubleshooters, chosen secretaries who acted as word processing consultants to the other secretaries.

Joanne had been a legal secretary and a troubleshooter under the firm's previous word processing system. In neither her former troubleshooter role or her current position as word processing manager had she acquired any formal education in the design or delivery of adult training within an organizational context. She felt the secretarial staff found it easier to learn from her than from the outside trainers the firm had hired at the outset of the conversion to WordPerfect, before she commenced her current training duties. She said:

> They find it easier to understand when I trained them because I knew the office, and I could explain it better. You know, you work at the actual job they do and you're able to explain it better.

While her secretarial training responsibilities were perhaps the most visible of her tasks, they were not her sole duties.

She was the chief resource on word processing for the secretaries and troubleshooters and had full responsibility for the firm's training manuals. She used vendor-supplied tutorial lessons for WordPerfect in the introductory training and augmented this form of instruction with her own drill material regarding WPM. She was also responsible for writing the

instructional material for both levels of supplementary word processing training. In addition, she was required to communicate, daily if necessary, any information pertinent to the secretaries' word processing duties. One of the senior participants explained that:

> Joanne sends the secretaries constant updates with memos and stuff. We may not always have a training session if there's just one thing. That'll be a memo that'll come around and you're asked to read it and put it in your binder. If you have any questions, then you go down and see Joanne.

Joanne was also responsible for in-house maintenance of the word processing hardware, including printers, and she arranged for out-of-firm service and repair when necessary. If there were software problems with either WordPerfect or WPM, she was responsible for contacting appropriate computer systems' personnel. Her first-level management position reported directly to the office manager.

The Troubleshooters

Troubleshooters were secretaries who worked for lawyers in the firm and were highly knowledgeable regarding the practical usage of WordPerfect and WPM. In addition to performing the responsibilities of a legal secretary, they acted as subordinates to Joanne and were, in effect, her deputies. They formed the first line of word processing assistance and consultation for the secretaries. Joanne described their job by saying, "Their position is just to try and take the flak, answer simple questions, and when they can't give an answer, then they come to me."

There were two troubleshooters per floor; roughly one for every 20 secretaries. In addition to being on call throughout the day to solve secretaries' word processing problems, they were expected to service the

printers on a regular basis, such as adding toner, new ribbons, and print wheels. Aside from their regular salary, they received no additional remuneration for their troubleshooter duties. They were paid overtime wages for either secretarial- or troubleshooter-related tasks, but only if they worked past 5:00 p.m.[1] Joanne felt that the troubleshooters should be paid "something extra" for the work they did. She said:

> They put in their extra time. Sometimes they're busy helping other people and their work sits behind. Then they work overtime to cover it. They will get paid overtime if they work overtime, but that's it. Most of them are doing it because they want to learn more.

The desire for knowledge seemed to be one reason some secretaries performed the additional, and unpaid, function of troubleshooter. It could not be avarice. Three participants were troubleshooters and each stated they expected no extra pay for doing the extra work of troubleshooting. They maintained it was simply "part of the job." One of the senior participants, who was not a troubleshooter, confirmed Joanne's statement that troubleshooters did the job because of a desire for knowledge. She stated that:

> Troubleshooters want to learn more in depth of the system. They know more than the regular secretary does. They know more of the advanced functions, but that's about all.
>
> They have to clean the printers every week. They take them apart and vacuum everything out and put it back together. It's not really an enticing job to have.

The negative aspects of the job, such as printer maintenance, were offset by the status and corollary power derived from being a troubleshooter. Another senior participant, who was a troubleshooter, explained:

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[1]The secretaries' working hours were 8:30 a.m. to 4:30 p.m. Overtime at time-and-a-half was calculated from 5:00 p.m.

> They've asked people that feel they have the extra time to do that and, if something changes or there's some advanced training that goes on, we're the first ones that get it. We've had a chance to work with it for awhile before the other staff members are trained so that if they run into a problem then there's two people on each floor that can help them out rather than having poor Joanne running around just going squirrely.

Troubleshooting was not without stress. A participant-troubleshooter described the job reality.

> They rely on us quite often to fix things for them that they could very easily fix themselves. It makes it about three times the job because you don't have to put hard pages in between documents; there's all kinds of features. There's conditional end of page and whatever. They'll manually number everything or they'll new line down to the fifteenth line like they did with old letters, and it can be quite a mess when you get into it. It can take you two or three times longer than if they would have used the features that WordPerfect is meant to use. You could go in there, revise it in about two minutes, whatever, depending on what it is, but it'll take you half an hour because you have to clean everything up. It's just so much extra work.

Troubleshooters informally trained and tutored secretarial staff when they encountered procedural errors such as those related above. They identified incorrect keystrokes and tactfully taught the recommended procedures. When asked how much training the troubleshooters did, Joanne replied, "I couldn't give you any idea. I've not kept statistics on that. Some days, they don't get bothered at all. Other days, it's just one continual thing after another." She went on to say:

> People call for things that they're too lazy to look up for themselves. If they're trying to fit something on a page, they're trying to figure out the margins and what font to use and things like that, they don't want to sit down and take the time to work it out. They want somebody to tell them what to use.

Interestingly, none of the participant-troubleshooters identified the coaching they did as training or teaching. Troubleshooters apparently felt that "telling" was not the same as "teaching." They also did not feel that their tutoring was a significant aspect of their job. One participant-troubleshooter felt that, overall, she did a minimal amount of training. She related:

> We're into training on a very small scale. 'Cause sometimes the people are aware of what the system is capable of doing, but they'd just never used that function before. So that's when they'll come looking for us, and you pretty well have to know it. Mind you, the staff is pretty good. I've run into a problem where I'll say, "Well, gee, you know, I really don't know, but let's try the-blind-leading-the-blind process and see what happens." If I don't know, then there's five other girls, plus Joanne, that you can always ask for help.

It would appear that this participant did not realize that, either by individual or collective effort, troubleshooters trained secretaries. Asked if Chase Bedford provided the troubleshooters with any courses or seminars on adult training skills, Joanne replied, "No. None."

When asked what she looked for in choosing a secretary to train as a troubleshooter, Joanne first mentioned human-centered skills, stating, "You have to be a patient person. Somebody that gets along well with people. Somebody that's not afraid to try different things and who is fairly good with their own work." She gave interpersonal skills priority over technical skills. She did not mention teaching ability even though it was a frequently used facet of the troubleshooter's job.

The senior participant-troubleshooter, quoted above, confirmed the need for positive, people-centered skills.

> Sometimes people will do something and I find that one of the biggest skills that I personally need is the ability to be able to control my sarcastic tongue! (Prolonged laughter)

> You know, because somebody'll do something and the first time they do it, I have no problems with walking them through it and getting them out of it. But when they've done the same thing four times in 20 minutes, I get a bit short. And, it's really good for my patience level. (Laughter) We have very few instances of that, but every once in awhile there are certain people that you'd just sort of like to take and bang against the wall and say, "I told you this!" (Laughter) But you can't do that because, you know, they're under a lot of pressure because usually when something goes wrong, it's right in the middle of something that has to be done right now, and they realize they've made the same mistake three times and they're feeling a bit stupid anyway, and you just sort of bite your tongue and grit your teeth. (Laughter)

I asked Joanne if there was a conflict of interest between being a troubleshooter as well as a secretary. She replied that "there can be, but they're told that they're secretaries first and that job comes first." I then asked her how the troubleshooters' lawyers related to this arrangement. She smiled a small smile and said,

> Some of them are pretty good. If they're on a rush or something, though, they can get very frustrated if their secretary is not at her desk. So you try to pick people that work for more senior people that are understanding. It's up to that secretary, though, to say, "Well, I'm working on a rush right now. Can you call somebody else?" And, if they don't do that and their boss gets mad, (small pause), that's not good!

The troubleshooters' job was, therefore, diverse. It involved servicing hardware such as printers; consulting with the word processing manager, other troubleshooters, and co-workers; advising other secretaries; correcting keystroke procedures; and teaching technical information. The troubleshooting job provided scope for using interpersonal and problem-solving skills, thereby according the troubleshooters some form of power and higher status than their peers. They received no extra pay for the additional responsibility, but they did get a broader

word processing perspective than the other secretaries. They could also feel pulled in opposite directions by the need to support their lawyer as well as their peers. When asked why she performed the extra task of troubleshooter, a young participant-troubleshooter replied, "I really enjoy the job because it keeps me on my toes. It gives me a challenge."

Informal Word Processing Training

The Secretaries

In addition to the formal training personnel, word processing training was accomplished informally by the secretaries themselves. One of the participants related:

> If a girl on the other side of the office says, "I've got a great way to do this," (it was in the manual, of course, but no one had looked at it,) and then she tells other girls about it, and they put it into a little memo and tell everyone about it so that everyone knows. A sort of easy way to do things.

Another explained that,

> I had never done document merges, where if you have to send the same letter to 45 people, you don't want to have to keep on typing that letter over and over and over and just want to change the address. Our system is capable of typing up all the addresses, typing up one letter and pressing a button, and then suddenly you have 45 letters, everything. I never knew how to do that and one of the girls did. She told me how to do it, and the next thing I know, I know how to do it! (She smiles.) You know, everyone helps everyone.

The secretaries constituted an informal training network. Though ancillary to the formal training process, this network was at least as effective. This informal system also formed a support mechanism for the formal training by reducing the demand for the support and services of the formal-level personnel.

Additional Word Processing Training Methods

Two additional word processing training methods at Chase Bedford warrant attention. The first was the supplementary training that followed the introductory session. The second was the word processing training manual that each secretary used on the job.

Supplementary Training

In addition to introductory training, the two-and-one-half days that were devoted to introducing new secretarial staff to the computerized word processing, the firm also conducted follow-up word processing training. These half-day classes, referred to by the staff as "advanced training," were supposedly compulsory after a secretary had been on the system for at least two months. The word "compulsory" here needs qualification because as Joanne, the word processing manager, stated:

> They should be on the system at least two to three months. I wanted to do that within three months, and I just haven't been around to it. (Pause) I <u>was</u> going to do training in January [two months prior to this interview], and then I was gonna do it in February and then with everything, I just never got around to it.

She further stated that the purpose of the "advanced" training was a "review of the basics, 'cause you will forget. There's so many features that you can't possibly learn them in one shot" (meaning in the introductory, two-and-one-half-day training). She explained that she had developed two levels of supplementary, post-introductory training that covered columns, tables of content, indexes, and sorting. As she said,

> It's all steps that will save the secretary in the long run and make her job easier. She'll go back to her desk and she'll be doing things, and she may think she's doing them right, but actually she's making more work for herself. So in the advanced training they learn shortcuts so they can read

> their E-mail without having to exit out of their document and things like that.

Joanne had planned for "little workshops where, at lunch hour on specific days, come in and just 'do,' if you're interested in learning something a little extra."[2] There were sign-up sheets in the training center where a secretary could add her name to indicate her desire to attend a class that covered one or two specific WordPerfect functions. Joanne also encouraged the secretaries to let her know their individual training needs. She said she then tried to arrange a special-interest class "if there are enough others also interested." If there were not, she tutored secretaries individually.

The young participant-troubleshooter quoted in the following chapter on electronic peer pressure who declared that any computer monitoring was a violation of her democratic rights and decried common and compulsory keyboard-entry procedures, had a much different perspective on her co-worker's rights as they related to compulsory attendance at the supplementary training classes. Her views were interesting because, as a troubleshooter, she must have known from personal experience the efficiency problems attendant with the secretaries' ununiformity of keystroke entries. Supplementary training was an attempt to achieve commonality of entries. When asked if she thought attendance at supplementary training should be compulsory, she replied,

> I think that everyone should attend. I mean, that's part of your job, that's what you're paid to do. I don't know. I suppose it would depend on the lawyer. You know, if he said, "Well, I'm never gonna use that. You don't have to learn it

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[2]At the time of this interview, Joanne's lunch hour workshops were still in the planning stage.

> for me." I suppose whoever was so opposed to learning it could say they'd skip it. Or either that or they'd attend the class, then they would just tune you out anyways. I mean, no one's gonna learn unless they want to.

When asked if she thought there were secretaries who refused to learn, she replied, "Oh, yeah. I do. I think they go in there, and they're not paying attention. They don't particularly want to learn."

Supplementary training at Chase Bedford was a haphazard affair. Joanne would have liked to do more of it more frequently, but other responsibilities related to introductory training and her management duties seemed to take priority. The young participant-troubleshooter quoted above expressed her belief that,

> You can't make master computerists out of people who don't use all those features. People don't have time to learn features until they have to use them. Law firms are an incredibly busy place, and they won't have the time to just play around with them, and unless they're actually using them, most people don't get the chance to learn them.

This statement expressed precisely why there is an ongoing need for supplementary training at Chase Bedford. If the secretaries did not have the time to "play around" at their terminals to learn the software, the only place they would have time set aside for that express purpose was in the supplementary training sessions. Regular and frequent supplementary training could provide the time they needed to learn.

Joanne stated above that advanced training was actually a "review of the basics." It appeared, then, that the supplementary training classes at Chase Bedford were not so much "advanced," meaning higher level or beyond introductory, as they were an attempt to remedy insufficient

and/or inappropriate skills acquired in the introductory training sessions.

The Word Processing Training Manual

The firm supplied each secretary with a yellow, three-ring binder that was referred to by the secretaries and Joanne as "the training manual." In it were the introductory session's WPM notes and WordPerfect training lessons, as well as any subsequent system and software information provided by Joanne in the form of memos and communiques. A sample page from one of Joanne's memos is shown in Appendix I.

The physical state of each manual may be described, at best, as individualistic. The sample manual I perused, left behind by a retiring secretary, had no section markers or tab indexes. All material, including Joanne's memos, was filed chrondlogically, making quick referencing of specific information difficult. Pinpointing specific WPM or WordPerfect procedures in Joanne's memos was also difficult due to her conversational writing style. This particular manual also contained the secretary's scribbled notes and jottings which were inserted loose at the back of the binder. I examined three other secretaries' manuals and found them to be in similar disorder.

One of the participants felt that there should be self-paced, learner-centered WordPerfect lessons written expressly for the firm. She found the vendor-supplied lessons unsatisfactory because they were geared to a general, American market and not to a Canadian law firm. She found the complete manual "hard to access" and put yellow tabs in places to indicate something she referenced often. She asserted that Joanne's

instructional memos were "too wordy and have the information buried in them." She said that as a result, "it's hard to find what you need."

Form and style aside, content quality was also questionable. Five of the seven participants related that they did not use the manual at all when they needed to learn a new feature. Instead, when they needed to learn how to perform a specific WordPerfect function, they asked other secretaries or a troubleshooter. When asked if she used the training manual, a long-term participant admitted:

> I find that, because of the way that it's set up, it's not all that useful to me. In certain instances when I want to do something, it's usually a skill that I don't use very day, and the examples in the manual, you have to go to a specific training setup, and I find that extremely frustrating. I don't have time to do that. Just tell me how to do it. Tell me how to get my end product, and don't make me go to a certain example where 90 percent of the work is already done, and all I have to do is push two buttons to get what I want, because I have to do the work to get what I want!

Another participant clarified that:

> From an initial training point of view, I think that the manual is more than sufficient. It gives you all the basics that you need. It's when you start getting into the more advanced features of the system that I find it a little bit lacking.

Joanne, too, was aware that the manual was "a little bit lacking." She related that she was currently writing a Chase Bedford beginner's manual for WPM because, "The manual we have is not a very good training manual. I pretty well have to be sitting there the whole time and helping people through it because of the way it's set up." Although she was creating the new WPM manual for the firm, the material was being developed in her personal time. She said:

> I'm doing it at home because I just don't have time here. It is always something, so many interruptions, and they did give

> me a pc [personal computer], so I've got that at home. I rest a little bit in the evenings, and I work on it. It's taking a while, but I don't sit there and work five, six hours straight or anything like that. I'll spend a couple of hours on it every other night or something.

Joanne said that she had been working on the new material for almost six months, and she felt that it might be a similar period of time before it was completed. I asked her if she was compensated in any way for writing the new manual. She said that she was not. Furthermore, she said that she did not expect any compensation because she considered rewriting the manual to be part of her management duties.

In review, the word processing manual used by the secretaries at Chase Bedford formed an integral part of the overall training procedure. It was used extensively in the introductory training session and, thereafter, as a means of supplementary training, reference and support. It had inadequacies, however, such as content deficiencies and lack of organization, that impaired its effectiveness.

Summary

On a formal level, Chase Bedford used a word processing training plan that included a word processing manager in charge of training. Troubleshooter-secretaries provided consultation and remedial training to the secretarial staff. On an informal level, secretaries supported and trained each other.

The firm conducted introductory word processing training sessions for newly hired secretaries. They received instruction in WordPerfect Management (WPM) and WordPerfect Version 4.2. There were also supplementary word processing training classes for all secretarial support

staff. In combination with the word processing training personnel, Chase Bedford relied on its word processing training manual to achieve effective training.

Context of Training Questions

I found a number of questions recurring as the research continued. Was the word processing training at Chase Bedford typical of other legal offices? If it was typical, was it meeting the learners' needs? What should a legal secretarial word processing training program encompass? What was the larger context from which to gain perspective on the secretaries' training experiences at Chase Bedford? So that the secretaries' word processing training experiences at Chase Bedford may be seen in contextual perspective, a review of selected literature follows.

Selected Literature Review

Literature Related to Computer Training for General Industry

A review of government and periodical literature indicated that employers generally lack an understanding of the value of computer training.

A statement paper published by the Economic Council of Canada, 1987, confirms that most computer-based technological changes require new skills. Adequate training to support and encourage the acquisition of these skills is, therefore, an appropriate and important organizational response.

When industrial change is considered, office automation dominated the 1980-85 period. Computer-based, office-related technology was innovated by 65 percent of all establishments surveyed. Furthermore, 64

percent of all industrial innovations of any kind in the same time period were found to be related to office automation.

Personal computers were the most common device innovated, followed by standalone word processors. The Council predicts that the next major phase of office automation will be larger-scale, more sophisticated, integrated networks. Nine percent of the establishments surveyed in 1985 reported that they had introduced such office networks, indicating that this phase actually began during the first half of the 1980s. Office automation is expected to remain the dominant form of this change with 51 percent of all applications anticipated between 1986 and 1990.

In the Council's Working with Technology survey, two-thirds of the firms that had introduced office automation reported that they had provided some retraining in response to the introduction of computer technologies. Most of these firms do some technology-oriented retraining; however, much of the activity carried out to date appears to have been informal and of relatively short duration, predominantly aimed at adapting existing skills to new equipment. Clerical workers, in particular, have been the focus of much of this retraining: over one-half of the retraining programs reported involved this occupational group. The statement goes on to say:

> Our case studies have shown how critical the presence of a well-trained work force is to the optimal performance of the new technologies. However, while we found instances of very substantial employer-sponsored retraining, the survey results suggest that they are not typical. On balance, our research does not provide evidence of major skills development on the part of Canadian industry in response to the computer technologies introduced so far. In our view, this indicates an overall undertraining in response to technological change. This conclusion is supported by recent evidence suggesting that Canadian workers get about two hours of in-plant training

annually, compared with 100 to 200 hours for their Japanese counterparts.

> But companies may have been able to get by without major retraining efforts until now, because the bulk of computer innovations so far has consisted or relatively small, stand-alone office applications, with only a modest impact on skills. . . . Training must be an important element in an innovative organization's approach to change. It is critical for a full exploitation of the new technologies; it also signals a commitment to the work force (Economic Council of Canada, 1987, p. 16).

Companies consistently underestimate or completely ignore the importance of computer training. In many instances, "affected employees, even those with no previous computer experience, are unfairly expected to quickly master software programs like WordPerfect on the job or in their spare time (Kokkoros, I988, p. 26). As a consequence, many employees fail to learn how to operate the new technology properly, or to its fullest potential. According to Julia Gluck, consulting manager for The Institute, the educational division of DMR Group Inc., "the amount that a company spends on informing, educating and training their staff on computers and communications technology can prove to be one of the best investments they'll ever make" (Kokkoros, 1988, p. 26).

Portis and Hill (1989) concede that comprehensive training and involvement of all employees in quality improvement and technological change can be expensive and time consuming. They argue, however, that the results can be impressive in terms of employee acceptance of technological change and greatly improved product quality and overall efficiency. They believe that the actual savings from improved quality and increased efficiency are substantially greater than the training costs.

Literature Related to Computer Training for Legal Secretaries and Law Firms

Nation wide, legal secretaries are routinely trained in schools and law firms. From the literature review, however, it is apparent that few studies have examined the specific nature of legal secretarial word processing training in either of these settings. The following section reviews selected North American literature pertinent to legal secretarial word processing training in either schools or law firms.

American Studies

Lehman (1985) conducted an investigation in Arkansas of personal computer utilization in accounting, legal, and medical firms in order to assess the implications for business education curriculum. Questionnaires were mailed to 1,156 accounting, legal, and medical firms. Each employee who operated a computer was asked to respond to the questionnaire.

It was found that the three software applications most frequently used were for accounting/bookkeeping, word processing, and spreadsheets. Accounting and medical firms used the personal computer primarily for accounting/bookkeeping and spreadsheet applications. Legal firms used the personal computer primarily for word processing applications.

Lehman determined that educational institutions have made little impact in providing formal instruction on the use of the personal computer. At the time, if training in this area occurred, it was conducted primarily by the employing organization. Self-instruction was the primary mode of instruction for office workers. It was also concluded that the reading of current computer literature and attending in-house

presentations were important sources of continuing education for office personnel.

This study concluded that employers rated computer proficiency, with emphasis on software applications programs, highest on the list of skills most needed for completion of job responsibilities. Knowledge of programming languages or the historical development of the personal computer were of minimal importance.

Lundgren (1987) investigated the use of computerized records management in law firms. This researcher found that previous studies (Camfield, 1984; Davis, 1984; Henry, 1984; Phillips, 1978; and Perry, 1977) examining the skills required for law office personnel had determined records management to be a required skill.

The legal profession was chosen by Lundgren for this study because law offices traditionally manage a large volume of paper records. The quantity of legal records and the extensive amounts of legal case research data used by lawyers indicated that law offices needed computer facilities. Law office personnel needed computerized records management skills in order to use computer facilities effectively.

A questionnaire was used on a target population of legal personnel who used computers in all law firms in the Salt Lake City, Utah metropolitan area. The majority of the respondents used a computer for records management. Fifty percent of the respondents stated that in their law firms it was the secretaries who performed this function.

It was determined that there was no relationship between firm size and secretaries' use of the computer for records management. An

approximately equal proportion of secretaries used the computer for records management regardless of the size of the law firm they worked in.

A larger proportion of large law firms (over 20 employees) had mainframe computers, microcomputers, dedicated word processors, and magnetic card typewriters. The equipment used by a majority of the firms at the time was the dedicated word processor.

It was found further that most secretary-respondents had not taken a records management course. The few who had were most likely to have taken it in high school or college. Law office employees (especially management personnel) believed that a records management course was necessary for law office personnel. However, curricula of records management courses usually do not include computerized records management skills.

The findings revealed that law office employees manage both paper and computer records; therefore, both aspects should be included in a records management course.

Lehman (1985) concluded that because of the expected continued growth in the use of personal computers, business education departments should integrate personal computer competencies into the business education curriculum. Emphasis should be placed on applying software programs and, especially, word processing skills. Business educators should work closely with businesses such as law firms that utilize personal computers and word processing equipment.

Lundgren (1987) drew the conclusion that legal secretaries must be competent in the management of both paper and computer records, and that

these types of records management could be topics in any records management course. This study also indicated that a records management course should be a requirement in the legal secretarial curriculum. Since dedicated word processors and mainframe computers were found to be used in a majority of the firms, it was concluded that students should have some familiarity with this equipment.

Canadian Studies

Ron Baker, president of Canadian Society for the Advancement of Legal Technology, in Canadian Lawyer (1989) states that computer use by Canadian law firms is the norm rather than the exception, as it was five years ago. But he questions whether law firms are getting the full benefit of their investment. Canadian Lawyer's 1989 software survey, confirmed by lawyers and law firm administrators, indicates most firms do a good job selecting hardware and application software. They consider their requirements first, plan adequately, and use a number of information sources. Baker says, though, that "most firms drop the ball on implementation and training" (1989, p. 18). Too little time and effort is devoted to implementing the technology and training the users. According to the vendors surveyed, it should take just over a month to implement a software package. Vendors find that law firm secretaries are not using the advanced functions available in most word processing packages. Many secretaries, deprived of proper training, use a word processor as a "glorified typewriter, costing the firm productivity" (Baker, 1989, p. 18). Advanced word processing training and "refresher" training is rare. Bad habits, developed in the rush to implement, are

rarely corrected. Opportunities to learn advanced functions are equally rare. Lawyers and administrators may be getting better at choosing technology, but many are still not doing enough in training and implementation. Increased productivity will not come through buying more software or replacing systems, but through better use. Baker concluded that better use is a direct result of better training.

Baker and Baetz (1988) in Canadian Lawyer find that law firms feel word processing systems have improved the appearance of documents and the speed of document preparation and editing. Fifty percent of firms found implementation and training took more time and effort than expected.

Canadian Lawyer's 1988 software survey found that, on average, law firms spent $13,000 per lawyer on equipment and software. An additional $2,000 went to furniture, facilities and other costs--a total of $15,000 per lawyer. One in five firms tried to recover costs through charging clients. Usually those charges were for word processing time or for pages printed.

Cohen and White (1987) believe that a training plan is the concrete mechanism by which training goals are put into practise. Referring partly to Greenbaum's (1985) criteria and partly to their own research-based findings, they state the characteristics of a good training plan to be:

1. The use of both formal and informal courses, where informal training follows prepared courses to reinforce the material in the actual working environment.

2. The need for a supportive environment for both formal and informal training, including instruction by trainers 'from the ranks' rather than professional instructors.

3. Transferrable application training, beginning with specific applications such as word processing, but

emphasizing the concepts rather than specific codes or 'button pushing.'

4. Ongoing access to courses so that knowledge can be built up as needed.

5. The plan must include provisions for adequate training-support staff. Trainers who are 'from the ranks' should not be expected to provide training in addition to their regular duties.

6. All clerical training should include information on the health and safety problems associated with VDTs.

7. In general, research has shown that people who are learning to use a computer do better if they work in groups rather than in isolation (Barrie, 1981, pp. 24-25). (Cohen & White, 1987, p. 106)

The Canadian literature identified the need for law firms to invest in effective computer training for staff. Employees should not be expected to become instant experts on the new technology just because they were experts on the old. A sound training plan is of paramount importance. Training is often rushed and disjointed; results are expected in too short a time. Training costs must not be underestimated and usually run far beyond the initial hardware and software investment. Law firms not only should increase their training budgets for the initial implementation period, but for ongoing review training as well. The literature recommended using effective employee word processing training plans as a sound method of operating computers more efficiently and, hence, more profitably.

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CHAPTER 3

WORD PROCESSING TRAINING AT CHASE BEDFORD

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CHAPTER 4

ELECTRONIC PEER PRESSURE

Scenario 2 - Little Sister May Be Watching!

Ellen sat in front of her terminal with a frustrated expression on her face. She had been asked by her boss to locate from the computer storage system a lengthy agreement that had been drawn a few months earlier by another lawyer within the firm. Her lawyer had supplied her with the names of the parties and name of the in-house lawyer who had prepared the agreement. Her task was to retrieve the computer-stored document, make extensive revisions to it to suit the needs of her lawyer's client, and print it for the client's signature some two hours hence.

Ellen scrolled through the first few pages of the 27-page document. She found that the secretary who had initially input the document had not used a paragraph numbering feature. This feature should be employed at the time of the document's creation and is accomplished by entering a software command before typing each numbered paragraph. If additions or deletions of numbered paragraphs occur, the presence of this code results in automatic renumbering of the sequenced paragraphs.

Had this feature been used during the initial drafting of the document, Ellen's changes to the text would have produced numerically ordered paragraphs with a minimum number of keystrokes. She now had two choices. She could type the renumbering code for each numbered paragraph in the original text, as well as for the new paragraphs she was adding.

Alternatively, she could scroll through the entire document and change the numbers one by one to reflect sequential progression. She was faced with a lengthy task whatever method she chose.

"Oh, great! Just what I need." she snapped. "When are they going to figure out that we can't be expected to produce on cue when we have to clean up somebody else's sloppy work before we even get started! I've told Joanne about this problem with her (the original typist-secretary's) work. Here I go again!"

My Document, Your Document, Our Document

Ellen's scenario portraying a secretary required to use another secretary's computer work is common at Chase Bedford. The networked computer system this firm uses was designed to allow for document access by any of its users. This feature allowed sharing of information in all forms, documents-as-precedents being one of the most common, resulting in savings for the firm.

Using previously input documents as templates, or precedents, is a standard procedure in any law firm, Chase Bedford included. For example, if a commonly used type of document is needed, such as a lease agreement or a shareholder's minute, it is more efficient and, hence, more profitable to use an already-drafted document and simply revise whatever is necessary to reflect the current parties and situation.

One of the participants explained how revisions form an integral part of her work:

> When you're revising, which is a majority of what we do, everything has to be <u>just so</u>, so you revise several times. Cuts down a lot of time. I think you can push more paper with the new system than we ever could before.

It was not the simple retrieval and use of existing documents that caused Ellen such consternation. It was the stress and pressure caused by needless and time-consuming revisions that were based on the originally inefficient and/or just plain wrong keystroke commands she found in the retrieved precedent. All participants reported similar feelings of frustration when revising what they defined as improperly input work.

As one of the participant related:

> If I went into their document I might see that they didn't know how to use columns. Putting information in columns, which really isn't very difficult. But a lot of people didn't know how to do that, and then when you would go in and revise their work if you had to, if you were working with someone else, then it was a real problem to make revisions. You just couldn't do it. You almost had to retype it. And if someone didn't use automatic paragraph numbering, and then you went in to change it, then you had to go through the whole darn thing and change them yourself.

Another said:

> Once I did a revision and it took me a whole day to get through it because it wasn't properly done in the first place.

A senior participant explained:

> The problem that we're having right now is that not everyone's working the same way. So, for instance, automatic paragraph numbering. Some people use it, some people don't. If I am out, and I've done an agreement without paragraph numbering, and someone else comes in to revise that document or work on it, they have no way of--like, if they're used to using it, it should be standard. I think if the feature is available on the system that it should be used.

When asked if she had ever had to revise someone else's document, the same participant replied:

> Oh, yes. Numerous times. Yeah. And they don't use the proper macros. It's really annoying. The problem with this system is that it's the hidden codes. The other system, there were no hidden codes. Everything was what was on the screen. This system has the hidden code system. So, you really can't tell at first glance what's been done and what hasn't been

> done. And sometimes, you're in a rush, you'll go in, assume it's been done properly, make your revisions, attempt to print it, and everything's just a mess. It doesn't come out on the proper paper. So, it can be really annoying if you're in a hurry.

When asked if all the secretaries used the same keystroke manoeuvres when inputting text, Joanne, the word processing manager, revealed that they did not. She further added:

> Some people never change their tab settings. And, you know, if they're set at every five, and they go to their document, and then they start tab, tab, tab, tab all the way over to maybe position 50; where if they set their tabs to start with, they wouldn't go through all that nonsense. It's little things like that. They may not seem like a big thing, but when you're starting to edit documents, and somebody that does do it properly has to edit one of their documents, it's frustrating. You're duplicating the work. Like, if you use the features that are there, and if everybody uses it the same way, it doesn't matter if there's one secretary working on a document or ten, that person can just go in and make the revisions without having to search through all the codes and figure out what this person is doing.

All of the participants stated that one of the extolled strengths of the word processing software was its ability to shorten and simplify the task of revising text. This supposed ease of revision, though, was negated because the staff did not conform to a standardized method of input, meaning the keystroke codes each secretary typed. Revisions were often difficult and time intensive because of the inaccurate use of the software codes during the initial input of the document. As a result, the revising secretaries felt frustrated and angry because they had no direct authority or control over the originator-secretary and could not demand immediate changes to the original secretary's style of input. The underlying issue was which secretary "owned" and answered for the document: the original secretary who created it incorrectly, or the

revising secretary who had to clean it up through prolonged revisions. It was not clear which secretary, ultimately, answered for input quality at Chase Bedford.

In summary, Chase Bedford's networked computer system produced three new issues. Firstly, ambiguity over document ownership raised questions regarding the nature of the relationship of the secretaries to each other. The sharing of documents called for a team orientation from traditionally solo players. Secondly, the value of the system was reduced when shared documents contained inefficient or inappropriate keystroke entries. This caused more work and negated the potential efficiencies of the system. Thirdly, after implementing the new computer system, Chase Bedford adopted the practise of work quality monitoring through secretarial peer pressure.

Selected Literature Review

Historical Perspective on Computer Monitoring of Secretaries

'Big Brother' is Likely Watching

The participants' accounts set out above illustrate just one facet of computer monitoring that occurred at Chase Bedford. There have been many studies centered on the phenomenon of employers' control of workers via electronic scrutiny (Betts, 1988, p. 13; Garson, 1988; Cohen & White, 1987, p. 78; Bertinuson, 1986; Labour Canada, 1982, p. 15; Menzies, 1982, p. 36; and Kiechel, 1981, p. 174). The literature is replete with illustrations and examples of how computer technology has been responsible for a more monitored, more controlled, and less autonomous work life. For example, timed entry quotas, and daily keystroke and line counts are common methods of computer monitoring of employees.

Carter (1987) postulates that in addition to cutting labour costs, both through deskilling and actual job loss, computer technology has the ability to increase managerial control over workers. She maintains that "managerial control over workers has become increasingly structural in nature; that is, it has become embedded in the actual technology used in the workplace" (p. 202). Through computerized supervision and inspection of work, Chase Bedford had strengthened its already direct and real power over its secretarial workers.

Computer Monitoring

Ability to Monitor - Management's Policy

Illustrating the kinds of computerized observation that Chase Bedford was capable of performing, Lawrence, the office manager, explained:

> The kinds of things that we want to do with this system is have her [Joanne] go around--I sent her a little memo a few days ago, "Big Brother's watching you." Like, we can go into somebody's documents now, and she can, sitting right at her terminal, and get back to people, saying, "Do you know that you're doing hard carriage returns, that you're saving things the wrong way, and so on. We're not doing it to be Big Brother, but we're doing it to help the system itself be efficient. If somebody is using the system inefficiently, then that, in effect, slows down the whole system.

When asked if a computerized record was kept of the secretarial support staff's daily work, task by task, Lawrence explained:

> Oh, we could. The system automatically looks after all of that. When they sign on, there's a little clock that works, and at the end of the day, or the end of the week, or whatever, we can get all kinds of statistics, like how long you were on the system, how long you were printing, how long you were revising, how long you were creating the documents. Those kind of statistics are all there.

In response to being asked if keystroke counts are conducted on individual secretary's input, he continued:

> No, we don't use it. The lawyers, I think, police their own secretaries. They know if they're not getting their work out, or have an idea of what kind of a volume should be put out on a daily basis.

Chase Bedford used WordPerfect Management (WPM), a statistics-management software program that overlays and interacts with the word processing program. Joanne described the various monitoring functions WPM was capable of:

> What it does is it stores the documents in the proper directory for you. It manages the documents, it calculates the charges. It has an automatic delete feature which hasn't been used yet. It has archive features. And then I can generate reports. You know, because of the document master, I can generate a report by timekeeper which is a lawyer, by secretary. We can search the system by document type. You can search by date. You can do reports by date. I could say, what documents were done on the system January 25th, and it'll show me all the document masters that were created. And then I could ask for it to show me all the revisions. It has a lot of features.

A newly hired participant with some years of law office experience patiently explained the overall WPM monitoring that occurred by way of time logged on the system:

> Every time you start up, or do a document master on every new correspondence, or account, or memo, or anything that you put into the machine, it's given a number, the clock starts running, and then when you get your accounting printout, that shows the charges, your disbursements. It's got "paid for word processing" and there's so much in there for word processing. Usually some of the lawyers charge the whole thing. Some count it, cut it in half, because every time you go in to even edit, or make a correction, or redraft or whatever, the time is charging again, and some of the lawyers don't feel that the client should be charged fully for that. It depends on the lawyer as to what they do with it.

At the time of this study, Chase Bedford had arbitrarily chosen to use only some of the information it was capable of collecting with respect to its secretaries. This policy could be reversed unilaterally and was solely at the discretion of the law firm.

Likelihood of Being Monitored - Secretaries' Perceptions

Throughout the course of this research, it was apparent that all the participant-secretaries believed that the firm could monitor them. Most stated that they trusted management not to spy for evaluative purposes, but to keep tabs for "real" reasons, such as statistical information or housekeeping chores. Again, most trusted the motives of the firm to be positive, that is non-punishing, with regard to statistics gathering.

One of the few participants who did express an awareness of the dark side of being monitored related:

> The WordPerfect is really good. The WPM package at the beginning, I found very controlling and very annoying. Having to open a new document master every time you want to do a new letter, or a memo, or whatever, was very time consuming. And it's fine if there's some logic behind it, if someone explains to you why, but we weren't really told why we had to do that, other than it's to keep a record of the number of documents that you're opening in the system. Fine, fine. But, gosh, it's annoying when you have a letter that's going out to the [name of a Canadian bank] and you've got the address of the firm, the attention, the dear sir, the re, which is maybe two or three lines long, and you have to do another letter two days later, and you can't go back in and use that same letter and just block out the body of the letter and change it.[1] Things like that still are very frustrating, and there's a lot of people who still do that. You know, they're not supposed

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[1]Client correspondence was billed differently than precedent documents. Clients were charged computer time for routine, work-a-day-style letters and other correspondence-type word processing. They were not charged computer time for previously input and completed documents that were used as precedents; they paid only when new and subsequent revisions began. It was for these financial considerations that secretaries were not to use repetitive content as templates in letters.

> to. They're waiting for the wp police to catch them, (laughter), I'm sure.

This testimony typified the feeling of frustration expressed by other participants over WPM's interference with their day-to-day work routines. Its main value here is its reflection that some secretaries were aware of the monitoring capabilities of the system, and that their work pattern could be exposed.

The participant who faithfully related the workings of the time log features also exhibited her awareness of the other, more personal, aspects of electronic surveillance:

> We have our own code names and our own user-defined areas. So they say that nobody else can get into those. I think Joanne can 'cause she knows what our code name is. Now they say they don't use that, but if they wanted to check up on somebody, they sure could. You know, because you log on every time you start up in the morning and when you leave at lunch and then when you leave at night, so if somebody was abusing the system, I'm sure they could find out from that. But I don't think they do that, on the norm. I don't think they check into the system to see if you have been abusing it. They treat you like adults here. They can pretty well tell who's abusing and who's not.

A participant with over 10 years of seniority was adamant that monitoring of secretaries for evaluative purposes did not occur:

> There are programs on the system meant to run those kinds of statistics, but I don't think that they monitor from a specific point of view of a specific secretary to see how much she's putting out. I know at one time they were monitoring the printing that was coming out of each area so that they would know where to put the new lasers when they came in and that sort of thing. But I don't think there's any, unless there's a problem with the system. Then the people who are the originators of the WPM, [name of vendor] and WordPerfect mesh, they will get on and they will monitor the system as a whole. But I don't think they monitor any specific secretary. Not to my knowledge anyway. (Laughter) If they are, they're not telling us about it! (Laughter)

A young participant-troubleshooter, when asked about the possibility of the firm's electronic monitoring of secretaries, retorted:

> Oh, you could, but then that's sort of--(pause). You can't control everybody. You can't say, "Look this is the way we do this, and this is the way. This is this." I mean, everybody has their own working habits. You can't dictate how they want to do things. You know, they're set in their ways. You can do as much as you possibly can. You can try, but there's no way you can.
>
> You know, you can point out mistakes once in a while, but how are you going to walk up to someone and say, "I've been going through a few of your documents, and I notice that you do this, this, and this." Well, it's gonna be like Big Brother's watching me. I mean, this is a democracy. Leave me alone! (Laughter) People would not go for that. And there's no way you can diplomatically or tactfully walk up to someone and say that. It would be like you're snooping through my stuff. People are very possessive, and I don't think you could.

This participant's belief in her inherent right to work privacy was belied by the law firm's self-stated ability to observe her electronically.

Secretarial Electronic Performance Assessment

The research determined that secretaries were not given performance assessments based on electronic data collected via their computer work. Neither were they given comprehensive appraisals that measured their practical word processing skills or their conceptual knowledge of the word processing software.

A participant who had experience in vocational education stated:

> If an individual's working in an area, and they're not using those features, then it doesn't bother them when they go back in to make the changes. They don't appreciate the fact that, had they done it another way, it would have been a lot easier to revise it. Certainly there was never any testing. Because of my background, I sort of thought that if they had said to us, "Now, at the end of the month, we're going to give you a test on this to see whether you need further training, and if you do, if you fail this test, then you will need further training. If you pass the test, you won't require further training," I think it would have probably encouraged people

> to say, "Okay, I'm going to spend my lunch hour today, I'm going to go through this, and I'm going to practice, or I'm going to get someone to help me." But there was an attitude of, "I don't have time to do that." For instance, "I don't have time to delete my files, my extra files. I don't have time to do that. I don't have time to learn to do that. It's too troublesome." No one checks up to see that it's learned.

This comment was related to me in the first participant-secretary interview. I generalized it into a question and asked it in the remaining interviews. The other participants were unanimous in their response; all expressed the opinion that word processing proficiency evaluations would be unfair and less-than-adult treatment. They viewed the concept with what seemed to be surprise and dismay. When I asked a senior participant what she would think of a policy that checked each secretary's WordPerfect proficiency, she sounded incredulous.

> I don't know how you'd do that, though. I think you'd find it difficult. I mean, you could take someone and give them something to do now, and they might do fine. But when they're in a panic, or under pressure, or heaven knows. It's whether or not they're consistent with it. If a person has time and feels comfortable with a particular procedure, they'll use it. If they're under the gun, and they're not really sure, they're not going to use it because it's gonna take them too much time. So, I don't know how you can check a person's proficiency. It'd have to be done on a day-to-day basis, and it's just, I mean, it'd be a monumental task. I don't know how they'd do it.
>
> I might be a little bit annoyed if they did it to me. If they wanted to do it on <u>my</u> time, I'd be <u>really</u> annoyed. And I don't know where they'd find time on firm time because most people are just too busy. So, it just depends what they were hoping to achieve. I mean, it's not grade school.

Another participant-troubleshooter, with many years of experience in the firm, had the same opinion:

> Not everyone has the same abilities. Um, you take 100 people and train them. You're going to get maybe 50 percent who are extremely proficient. Not everyone has the same natural ability for that type of equipment. So, you'll get a terrific

> secretary who's very good at what she does, who may just not be able to grasp that piece of equipment. And, if she can get it to work for her anyway, all that helps her get her work out. You can't really fault a person if they're good every other way, and not all people respond the same to training, you know.
>
> Like, I've been here quite a while, but we have people here like 20 years. And you get a person that's gone from manual typewriters up into computerized typing, it's quite an adjustment for someone like that. And you can't doubt her abilities at doing what she's doing. She's been here so long. She's extremely proficient, but maybe her grasp of the system isn't what someone else's would be.

The young participant-troubleshooter above who so vehemently expressed her opinion regarding the annoyances created by inconsistent keystroke entries said:

> Anybody can sit there and read the written and have all the procedures in their mind, but when it comes to doing it, they haven't got a clue what they're doing. So, to test them as far as, oh, I dunno know, I guess a written test, or whatever, and anybody with somebody standing over behind them isn't going to be able to perform the same way they do as if they do on a normal, everyday basis. There's really no way to test proficiency.
>
> Joanne, the word processing manager, echoed their comments.
>
> I don't think that's fair. If somebody did that to me, I think I'd leave the firm! (Laughter) I don't like to be tested. I mean, they're adults; they shouldn't have to be tested and stuff like that.

The secretaries' ideal of standardized keystrokes to save revision time conflicted with their conviction that their word processing performance should not be appraised.

This study found no overt practise of secretarial monitoring and appraisal at Chase Bedford. One of the reasons these practises may not have been implemented is that overall responsibility for secretarial supervision and production standards had remained with the individual

employer-lawyers. As Lawrence, the office manager, stated above, "The lawyers police their own secretaries." It may be that the lawyers, themselves unmeasured by comparable productivity or efficiency standards, are unwilling to impose similar quantification on their secretaries.

Electronic Self-Control

Secretarial Dedication

Like any free enterprise organization founded on the principle of profit making, Chase Bedford had a management dilemma: how to supervise and control the creation of its most visible product (hard copy documents), without decreasing the secretarial dedication needed to achieve that product.

From the data, it was apparent that the firm clearly recognized the potential advantages of computerization. It was attempting to realize these advantages by integrating the technology with an organizational form of work routine dependent upon the "commitment of workers rather than their control" (Willcocks & Mason, 1987, p. 108).

Committed, dedicated secretaries were the key to the success of Chase Bedford's computer implementation. They were the chief players who would make it all work. To achieve this dedication, a positive personnel policy had been implemented. This policy recognized the many aspects of the new office system technology and gave support in the form of in-house training, consultation, and problem-solving personnel.

Control Through Commitment

Chase Bedford's word processing manager, Joanne, illustrated the firm's positivistic policy on computer support:

> You can be like Big Brother watching, you know, and monitor their documents, or you rely on the troubleshooters when they've had to troubleshoot a document where something's not working, and they see what's in there. Or, an operator will come to me, and she'll say, "Well, I can't get this to work. Can you look at their document?" And you say, "Well, you know if you did this, this, this, and this, it'll make it a lot easier for you next time." And, they'll say, "Oh, I never knew that." And, the next time, they'll do it. Some people won't, but--(laughter).

Pervasive surveillance had not been used. Instead, the firm had achieved a successful computer operation by striving for a commonality of values and goals among the secretaries. It was this commonality that invoked their cooperation and commitment to the computerized procedures. Attractive personnel policies, encouragement of initiative, and a congenial work environment were all part of the firm's enticement to be a team player and identify strongly with the goals of the law firm. These goals could be realized most effectively by staff who had "bought into the game."

Krahn and Lowe refer to the concept of corporate cultures, such as Proctor and Gamble's obsession with product quality, that sends a clear message to all employees. Brusquely stated, one either adopts these values or leaves. Strong "corporate family" cultures are, in essence, management strategies aimed at achieving normative control (Krahn & Lowe, 1988, p. 113).

Legal secretaries who support the aims of the law firm require less monitoring and supervision than secretaries who do not. As committed workers, they willingly take over more of the expert, supervisory, and even managerial functions necessary to achieve the firm's goals of computerized production of hard copy documents.

The statement of the young participant-troubleshooter quoted above who felt that the firm's ability to monitor her electronically contravened her democratic rights, illustrated a ominous self-centeredness. Was this secretary really saying, "I'll do it my way (hard carriage returns throughout, inappropriate tabs, no automatic paragraph numbering codes) and that's my right!"? If so, there was then another issue inherent in her statement and one with which the law firm must contend; that being, for whatever reason, her failure to see the need for commonly practised word processing procedures. Her reaction to the idea of monitoring indicates she considered it her right to be a solo player, not a team player. Ultimately, according to her word processing peers quoted above, the firm will find her nonconformity has a cost in the form of convoluted, time consuming revisions for those secretaries who revise her work. If her convictions were shared by a significant number of secretaries, revision costs would increase and profits would decrease.

The issue of secretarial nonconformity arose out of the ambiguous situation of who owned the document: the inputting secretary or the revising secretary. Consistency of input became a critical issue when work created by one secretary was passed on to other secretaries. This secretarial sharing of work afforded by the networked system's open access revealed that secretarial ambiguity existed over who owned the document, and who was, therefore, ultimately answerable for the quality of its preparation. If the initial secretary felt ownership of the document that was created, then this person likely felt the right to input it as he or she saw fit. Unless a secretary knew and, more importantly, cared why

uniform keystroking was important (shorter revision time; therefore, greater profits) the possibility that the document might be passed on to someone else was likely to be irrelevant. It became a situation of, "It's my document and I can do it any way I choose. If you want it, you clean it up." Perhaps the secretaries still were working in the traditional paradigm whereby they assumed total ownership and sole responsibility for their documents. They did not see themselves as part of a secretarial team that shared responsibility for all documents, through all stages of preparation.

When revising each other's computerized documents, the secretaries were, in effect, monitoring and supervising themselves. Electronic peer pressure forced them to appraise and judge their co-workers. The troubleshooter-secretaries reported recurring irregularities in input to the word processing manager, who then had the power to discipline the maverick originator-secretary. This phenomenon was repeated when secretaries who were not troubleshooters reported similar problems to either a troubleshooter or to the word processing manager.

The substance of law firm control still existed, but its form had been disguised and passed on to the secretaries in the construct of self-control through group peer pressure.

The goal of producing quality documents remained but, then, only *results* needed to be monitored and not the overall step-by-step input. In a memo to the secretaries, Joanne appealed to them to use the lockstep techniques that were presented in the initial word processing training sessions:

> Page 3: Everyone needs to follow the correct procedures. A lot of time and effort was spent in designing our system. The system is not running to its fullest yet (i.e. automatic archive and delete, searching on document types to name just a few) but when all of this is in place if everyone is doing their own thing all of the extras the system is capable of performing will be useless.

In another part of the same memo, she used the subtle threat of exposure by co-workers as a motivating force to achieve routinized work procedures: "Page 4: Are there any problems with working on documents that someone else has put into the system?" The law firm used its secretaries to monitor and report word processing co-workers who did not conform.

Summary

The secretaries at Chase Bedford felt they had autonomy and command over their working lives. In the ultimate sense, this was an illusion. The law firm had simply passed the "feeling of control, rather than its reality," to its secretarial staff (Willcocks & Mason, 1987, p. 109). Allowing the secretaries to feel in charge of their computerized work maintained the illusion of secretarial autonomy and control. Chase Bedford monitored its word processing secretaries via the phenomenon of electronic peer pressure.

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CHAPTER 5

LAWYERS AS CLERICAL SUPPORT

Scenario 3 - An Articling Student as Word Processing Trainee

Bill, a sombre, intense articling student in his mid-twenties, sat down beside me at one of the three terminals in the training center. He and two recently hired secretaries were scheduled to attend the two-and-one-half-day training session for the firm's new word processing secretaries. I was there as an observer.

I asked him if he used the system often.[1] He replied that he needed it when he came in on weekends or evenings and his secretary wasn't there.[2] He said there were also times during the day when he wanted to revise something that his secretary had typed, and he needed this training session to learn how to do that.

Bill and Tracey, a secretary in her early twenties who had come to the firm with a limited knowledge of WordPerfect, caught on quickly to both the word processing commands and WordPerfect Management (WPM). Bill worked the word processing software with an evident amount of confidence,

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[1]The common term used by everyone in the firm to describe the diverse mix of computers and peripherals such as printers, keyboards, and data terminal equipment, as well as software packages such as WordPerfect.

[2]Articling students did not usually have a secretary assigned exclusively to them. The most frequent arrangement gave them access to the secretary of the lawyer/principal who acted as their sponsor and guide through the rigours of articles, but the principal's work took precedence. As a result, a student's work could be assigned a low priority status, and this typically resulted in uncertainty over meeting deadlines.

and he was able to complete the WPM master document screens with ease. His keyboarding skills were slow, but he did touch type and did not need to look at the keys in order to find the correct one.

By contrast, Lynne, a secretary in her mid- to late-thirties who had come to the firm with 20 years' experience on a variety of equipment including standalone word processors, but with no WordPerfect experience, had difficulty grasping some of the WordPerfect commands and the general WPM concept. She consistently took longer to complete the training exercises than either Bill or Tracey. She vocalized her frustration during a coffee break by remarking, "I feel like a bozo. I'm so slow."

The three of them experienced some difficulty with various procedures during the training, such as those that covered the creation of document directory routes through WPM; Bill put their frustrations most succinctly when he muttered, "It's designed to confuse us!" Throughout the first day of the training session, though, Bill kept up to Tracey in mastering the training procedures and handling the assignments.

By noon of Day Two of the training, Bill seemed satisfied with his new knowledge. He announced that he had decided to skip the last afternoon of training as it was scheduled to cover only review-and-reinforcement exercises. Bill wished Tracey and Lynne good luck and said that he had found the training session very profitable. Though I had often heard him remark about being "overworked" and "only a lowly articling student," Bill's interest in the computer system was demonstrated by his parting comment that, "Lawrence is going to get me a terminal on my desk, that's for sure!"

Is Bill Typical?

Bill was not unique to this law firm, or even to law firms in general at this time. The evidence points to an increasing number of lawyers who are using computers to accomplish tasks that were once the domain of their clerical support staff in general and their secretaries in particular (Gower-Rees, 1987, pp. 23 and 29; and Putterman, 1987, p. 12). A 1988 survey of Canadian law firms revealed that the number of lawyers using computers is rising, and the number of lawyers using computers for word processing is also rising. In 1986, 2 percent of lawyers were computer users as compared to 9 percent in 1987 and 12 percent in 1988. In 1987 the primary use was for legal research. In 1988, word processing and document drafting were the principal reasons lawyers used computers (Baker & Baetz, 1988, p. 18). Of the 70 lawyers in the law firm that was the setting of this study, 6 were regular computer users. This represented slightly less than 9 percent of the firm's lawyers and is somewhat below the national average.

Lawyers who type their own documents or perform other similar tasks on computers will change the nature of secretarial tasks and create a reduction in or reorganization of clerical work in law firms. The implication of this phenomenon suggests that the future role of legal secretaries could be restructured significantly.

Selected Literature Review

Administrative Monogamy

Historical Perspective on the Division of Law Office Labour

One-Lawyer, One Secretary. Before the introduction of computerized word processing, lawyers traditionally did the things that lawyers do, such as advising clients on points of law and dictating documents. Their secretaries traditionally did the things that secretaries do, such as greeting clients and typing the dictated documents. Indeed, the usual staffing ratio in every law office was one to one, one lawyer to one secretary, and this was true of all offices regardless of size (Murphree, 1981, p. 65). For one lawyer there was one secretary; 10 lawyers employed and individually supervised 10 secretaries; in essence, administrative monogamy.

Lawyers' stock-in-trade consisted (and still consists) of words arranged on paper. This product was achieved by lawyers' use of writing tools, such as legal-size pads of paper, pens, and pencils. The secretaries' tools consisted of coil-bound stenographic notebooks, pens, pencils, and a typewriter. More recently, lawyers have used dictation machines to transmit their instructions to their secretaries, who, in turn, use the equivalent reverse equipment in the form of transcription machines to handle the volume of words. No matter what materials and equipment were used, the word workload of the lawyer/secretary unit was arranged on a one-to-one basis; that is, clearly divided between one lawyer as the originator of instructions and one secretary as the executor

of those commands. This was in practice a monogamic organizational and administrative policy.

Administrative Polygamy

A Team Approach to the Division of Law Office Labour

Many Lawyers, One Secretary. The introduction of computerized word processing in the mid-1970s highlighted the inefficiency and costliness of the one lawyer/one secretary staffing model and reporting relationship. It became apparent that by using the automated and computerized typing equipment, one secretary could handle the work of more than one lawyer. It did not take long for lawyers to note that, "Machines are getting cheaper and people are getting more expensive" (Musselman, 1980, p. 3). Many law firms believed that increasing the equipment component of the firm was an answer to the human cost pressures--buy more machines and hire fewer people. This contrasts with the pro-computer, populist conviction (Feldberg & Glenn, 1983) that espoused a belief among technological enthusiasts that, in the long term, computerization would benefit workers as well as managers (Westin, 1987; and Blauner, 1964). However, if law firms reflect overall industry staffing trends, it is unlikely that any reduction in the absolute number of clerical staff occurred during this period of equipment implementation.[3]

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[3]There is much evidence to indicate that law firms did not decrease the number of secretarial staff during the period from 1970 to 1986, the time that coincides with the microprocessor revolution (Statistics Canada, 1989, p. 21; Krahn & Lowe, 1988, p. 132; and Chen & Regan, 1985, p. 140). While Hunt and Hunt (1987, pp. 262-263) posit that the historical rate of growth of clerical jobs in general slowed during the 1980s, they found no evidence to indicate that there will be a significant decline in the absolute number of clerical jobs in the future. Menzies (1982, p. 35) is not as optimistic and states that clerical employment growth has slowed almost to a halt due to job vacancies that are being left unfilled and

Law firms thought they had found the solution to an office efficiency and work productivity problem in the form of word processing centers (Murphree, 1987, p. 102). The first office automation equipment to come into legal offices in the mid- to late-1970s were standalone word processors. These microprocessors utilized exclusively one particular vendor's word processing software. They did not interact with each other or with any other microprocessor; resulting in the label of "standalone." The implementation of this equipment took the form of word processing centers staffed with word processing specialists who were hired or trained specifically to work full time on the new equipment. Initially, legal secretaries were expected to use the centers for long (30 or more pages) and complicated types of documents that were specially suited to the text-manipulating capabilities of the computer. The computerized process became so specialized that by the mid-1980s many firms split the legal secretarial job into two parts, (1) administrative and (2) word processing (Murphree, 1987, p. 113).

This separation theoretically allowed the legal secretary to perform administrative tasks, such as gatekeeping (receiving visitors or incoming telephone calls and scheduling appointments for the lawyer), photocopying, file maintenance, distributing and sending out mail, and typing relatively short correspondence and documents. Word processing specialists in the

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clerical jobs that are being replaced by professional and managerial jobs. A further complication also may be that the small cohort of people born between 1964 and 1975, popularly labelled the "baby-bust generation" (Sandroff, 1989, p. 92), will not yield sufficient numbers of entry-level workers to fill the remaining jobs, legal secretaries included.

word processing centers handled repetitive typing tasks and lengthy documents.

Nonetheless, in many law firms this separation of functions was unsuccessful (Cohen & White, 1987, p. 79; and Musselman, 1980, p. 4). This division of labour resulted in support staff who did not own the responsibility for the final document. Word processing operators were accountable for only one task, typing, and thereby were not accountable for the firm in an overall business and global sense (Garson, 1988, p. 189). They answered to everyone and to no one. This caused confusion, tension and productivity lags when assigned work bounced back and forth between the lawyer, the legal secretary and the legal word processing operator. Delays in document turn-around time occurred, and serious consequences resulted from missed deadlines. The flow of information was diverted due to the two-tier clerical support hierarchy that had been created. Legal secretaries and lawyers now had to interact with a third party, the word processing operator. The direct, reciprocal relationships that had been the norm between the lawyer and the secretary had now changed in complexity. As shown above, many of these changes did not have positive results.

For several reasons the recent trend in law offices is away from word processing centers. The problems cited above and, perhaps as importantly, the steadily decreasing price of computers in general, have made it cost effective to put a personal computer or a terminal connected to a mainframe computer on every secretary's desk. As was the case with Chase Bedford, all of its legal secretaries were operating networked

terminals connected to a large computer. Like legal secretaries in other law firms, they no longer relied exclusively on the word processing center to do their work. They did their own word processing and, in so doing, had regained a degree of control over this aspect of their work. This also had the effect of reinstating the historical, direct lawyer-secretary work unit.

This is not to say that word processing specialists have disappeared from the law offices. Some firms have kept a small, centralized word processing center. Others have one or two operators working in decentralized areas of legal specialty, such as litigation or conveyancing, where the nature of the required tasks lends itself well to the capabilities of the word processing equipment. For small firms with under five lawyers, the concept of a word processing center has proven to be technically inefficient and socially untenable.

The acquisition of networked mini- and microcomputer terminals for support staff that allows access to newer, more sophisticated word processing software has increased the overall effectiveness of the technology. Robert White, counsel for the investors in the Principal Group, used a computer for daily entry of material from the Code inquiry. This lawyer and computer-book author is quoted by Gower-Rees:

> The publishers of WordPerfect, a leading word processing software package, just announced seven revisions to its program, six of which were directed at answering lawyers' needs. It is only a matter of time until the rest of the software industry follows suit. Lawyers don't need specially designed software, much of what exists can be modified to provide the necessary functions peculiar to the law practice (Gower-Rees, 1987, p. 24).

Networked terminals and advanced word processing software have meant that fewer secretaries are now able to support more lawyers. The one-to-one lawyer/secretary relationship in firms is being replaced by teams of lawyers, legal assistants or paralegals, and secretaries working as one unit (Betts, 1988, p. 13; and Musselman, 1980, p. 6). Some firms that use the computer-networked team approach believe the "efficiency of the network will eventually improve the ratio of lawyers to secretaries, from 2-to-1 to 5-to-1" (Spector, 1988, p. 49). Much of the repetitive and routine work of the secretary that was formerly processed on typewriters or standalone word processors is handled more quickly and at lower cost by the networked computer-supported workstations. These workstations, staffed by teams of legal support staff including secretaries, represent a shift away from a monogamic personnel design towards a more polygamic administrative and organizational style. The work place is not static. Another change is developing; a change towards administrative celibacy.

Toward Administrative Celibacy

Traditional Division of Word Processing Labour

Lawyers have always processed words. Whether imprinting language symbols onto clay tablets, or writing modern day alphabet with a Bic pen on yellow newsprint, lawyers unfailingly have recorded language by one method or another. When individual lawyers, working alone, became unable to keep pace with the volume of words, the legal secretarial role as assistant and office helpmate emerged and evolved into its current form (Srole, 1987).

Historically, lawyers delegated the mechanics of wordsmithing to their secretaries who now execute many of these tasks through the use of computers. Some of these computer-aided duties include drafting letters and documents, text and data inputting, formatting and graphics, text and data editing, using predesigned systems with preassigned and standardized file names, proofreading, using spelling and grammar programs, changing ribbons, changing print wheels, hand-feeding printers with paper or otherwise controlling paper input, gathering printed output, and ordering and stocking computer supplies (Murphree, 1987, p. 114).

A Unilateral Approach to the Division of Law Office Labour

Lawyers Who Do Their Own Computerized Word Processing: Chase Bedford

There are lawyers at Chase Bedford who, through the use of computers, are selectively reclaiming various aspects of the tasks identified above that they once assigned to their secretaries.

In the words of the firm's office manager:

> We have six lawyers on the system. One lawyer has a pc [personal computer], and he uses it as a terminal if he wants to so that he would be able to, for example, revise documents that his secretary has typed for him. Another lawyer that we have just has a terminal. She does a lot of revisions. We have a corporate lawyer who has a terminal, and he is using it primarily for revising documents. He does mostly annual returns and incorporation of companies. He's our newest user. He's only been trained a couple of months ago, and so he is learning the system. He's doing a lot of his own input typing. . . . But the kind of a nice thing that he said was that it helps him work better as a team with his secretary as opposed to just giving her the work to do. He said that now there are certain things that he can do as quickly by doing it on the terminal as he used to do by hand. . . . He says that it saves his secretary piles of time.

A senior participant confirmed that:

> There are a few lawyers in our office who have their own terminals in their office now which is a big help. If they're

> very busy and they give their secretary some letters to do and they wanted to have some revisions then, well, if the secretary's so busy, then the lawyer can go into the system himself, make the changes, and simply tell the secretary to print it out, it's ready. "I made the changes myself, you don't have to worry about it."

Other participants also saw benefits in having lawyers as users of the system:

> When the system was down for me, it was also down for her, so she had quite a bit more empathy for the problems that we were experiencing, the frustrations of losing documents or going back and having your page all skewed and getting three copies when you only asked for two, that kind of thing. That really helped a lot.
>
> I could do a draft of a statement of claim, and he could go in and make all the little changes that had to be made rather than having to do it on a hard copy, and then I have to peer at his writing to figure out what'n heck this number is he wants, and, you know, it's really improved.

Group Interaction and Participative Management

The team concept of secretaries and lawyers who word process together is based loosely on the management models known as group interaction and participative management (Morse & Lorsch, 1983, pp. 355-357; and Leavitt, 1968, p. 334). Firstly, in group interaction, management theory postulates that an effective way of getting worker involvement and enthusiasm is through the group--almost as a substitute for authority. People will be loyal to one another in a group, and they will feel committed to the group that they work with. Secondly, in participative management, the key idea is that people support what they help to create. These theories are based on the premise that productivity will rise if workers are committed to the work group and are involved in decision making.

Uni-Directional Control

The team approach and cooperative decision-making focus that are reflected above in the cases of lawyers who use the computer to "save their secretaries piles of time," to quote the office manager, only appear to be interactive and participative. In reality, they are models of uni-directional power and control.

Legal secretaries in law firms are not unionized labour and, as such, their lawyer employers are not bound by imposed union guidelines governing secretarial work practises. Furthermore, law firms are popularly known as the last bastion of the "cottage industry" economic model (Musselman, 1980, p. 4). This means that lawyers are autonomous entrepreneurs answerable only to their provincial law societies and have complete decision-making power in their day-to-day operations. This includes the implementation and application of word processing technology.

Dr. Margaret Bentson, professor in the departments of Computer Science and Women's Studies at Simon Fraser University, believes there are "a lot of myths to obscure the reality of what is happening. Computers in offices now represent the automation of service work. One must look at the potential for work reorganization and who has power in the society to determine the logic behind their implementation" (Bentson, 1986).

The secretaries at Chase Bedford were representative of other legal secretaries in private practice law firms in that they had no authority over their word processing employer. They had virtually no control over elements of change in their jobs; either whether the job ought to change at all, or what aspects would vary if change did occur. As well, they

had little control over whose clerical standards would be met; their standards as clerical specialists, or the lawyer's as clerical novice.

Labelling the phenomenon of lawyers who word process as "teamwork" belies the notion that lawyers are really helping their secretaries by doing their word processing work for them. Should the number of secretaries decline because their secretarial skills become commonly practised by their professional employers and their services are no longer needed, this is not teamwork; it is expropriation.

The secretarial role has also been threatened in another way. Computers are introduced most often into law firms without any secretarial input regarding design or use. The underlying logic used by the entrepreneurial lawyer is that technology should increase productivity, not achieve utopia (Bentson, 1986). This means that most lawyers introduce the technology for financial gain with little regard for secretarial workplace satisfaction. When applying computer technology into the workplace in this fashion, lawyers abandon previously espoused ideals of teamwork and cooperative decision making.

Lawyers who do their own input typing and revisions, tasks that historically were transferred to their secretaries, are actually "re-unifying the labour process, eliminating the many steps that had previously been assigned to detail workers" (Braverman, 1974, p. 328). The detail workers here have traditionally been legal secretaries. The consolidation of the word processing aspects of their work into the hands of lawyers has significantly affected secretaries' work.

A New Order - The Professional *Cum* Clerical

Real Men Don't Type

Like eating quiche, it used to be that real men didn't type--at least not for profit. The feminization of clerical work at the turn of this century entailed changing the image of the office worker and changing the definition of the skills necessary for clerical jobs. The large female presence in typing and stenography opened the way for the predominantly male employers to reevaluate the status of office jobs in general (Srole, 1987, p. 96). Clerical work became low status employment (Haddad, 1987, p. 42). In turn, this led to the stigmatization of the tool with which the occupation was associated, the typewriter. Since the typewriter's invention, lawyers bought the machines and hired secretaries to operate them. Lawyers themselves, however, displayed no desire to become owner-operators. Their "keyboard-phobia" (Crawford, 1988, p. 15) ensured that they distanced themselves from the equipment. That, however, was before microcomputers.

Keyboarding and the Law Firm

As one lawyer states, "But then, overnight, came the silent revolution. Some thousands [of lawyers] accepted the novel and entirely successful system about which they had bellyached for years. . . . It was an extaordinary [sic] advance in the education of the legal profession" (Ruoff, 1980, p. 20).

One noticeable effect of this revolution was the change in lawyers' attitude towards operating a keyboard. Keyboarding is unavoidable if one wishes to operate a computer, and Robert White believes

> . . . while it is easy to understand the concerns of those who resist typing on a computer keyboard because of a perceived inability to do so, it is hard to feel anything but pity for those who resist typing because they think it will diminish their status.
>
> "Typing!" will snort a senior executive who is asked to use a terminal connected to his company's mainframe. "Typing is for secretaries, not managers." If it is your ego that keeps you from the keyboard . . . you do need help (White, 1986, p. 55).

Lawyers, like other commercial entrepreneurs, have become computer users. The need for computer literacy, now a criterion for achieving a competitive edge in the marketplace, demands "that lawyers themselves must also become more computer-literate" (Willis, 1988, p. 11). "The legal profession, which has traditionally shunned the use of computers, is catching on to using them. It has to. Computers are a part of almost every profession, including those related to a lawyers' [sic] work" (Putterman, 1987, p. 12). The massive change that has occurred in lawyers' attitudes regarding computers seems to have assured the permanency of the technology in their profession.

Keyboarding and the Law School

Law schools, too, have realized that their graduates must be fully conversant with computers if they are to succeed in the practice of law. In 1987, A.T.& T. Canada Inc., in conjunction with the Law Society of Upper Canada, established a computer facility at Osgoode Hall in Toronto for bar admission course students and lawyers who want to be computer literate. George Thomson, Director of Education for the Law Society of Upper Canada says the classroom is made to simulate the same computer system one could set up in a law office and it teaches "necessary skills

including word processing, litigation support, expert systems and computer-assisted legal research" (Putterman, 1987, p. 12).

On January 1, 1989 the John A. Weir Memorial Law Library at the University of Alberta opened its IBM computer lab. The computers gave law students access to legal data bases through the University of Alberta's SPIRES system and the commercial QL (Quick Law) systems. Law Now, dated March 1989, reported that although the students spent much of their training in computer-assisted legal research, the law school also wanted them to be computer literate generally, as functioning lawyers, not only as researchers. Law students already used the law library's computers to word process term papers and assignments. Chan states that, "graduates considering law firms with which to article will be asking if they will have a computer on their desk" (Chan, 1988, p. 51).

Summary

Bill, the subject of Scenario 3, represents the latest wave in professional use of computers by lawyers. Like the other graduates of his class, he will need hands-on familiarity with computers in order to be competitive and successful in the practice of law. After sufficient numbers of computer-literate law students graduate and prove their profit-making effectiveness, they may become the norm. Lawyers who input material, draft documents, revise text and use computers for other tasks would no longer be called revolutionaries, but considered simply meeting the professional standard. From one secretary, to many secretaries, to almost none, lawyers now can do it all--by themselves.

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CHAPTER 6

SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

This chapter contains two sections. The first section summarizes the objective of the study, the methods used to collect and analyze the data, and personal reflections on the study. The second section states conclusions and recommendations that have been drawn with regard to the three themes of this study; (1) Chase Bedford's training policies and procedures for word processing secretaries, (2) secretaries who experience electronic peer pressure, and (3) lawyers who use word processing and, thereby, act as clerical support.

Summary

Goal of the Study

This study investigated and described the current word processing reality of practising legal secretaries. In particular, the study explored legal secretaries' experiences using WordPerfect Version 4.2 word processing software on networked video display terminals connected to a mainframe computer.

Methodology

Qualitative research methodology was used, including a review of literature pertinent to the five-month study. Data was collected by direct observation; by structured, formal, interviews which were then transcribed and stored on a computer; by gathering documents and records;

and by field notes prepared and stored on a computer. Data analysis utilized the principles of multiple sources of evidence, creation of a data base, and maintenance of a chain of evidence. Recurring issues and experiences documented in the field notes and transcribed interviews were cross referenced and then analyzed. This analysis resulted in the classification of three major themes: (1) word processing training policies and procedures at Chase Bedford, (2) electronic peer pressure, and (3) lawyers as clerical support.

Personal Reflections of Researcher

Case study research demanded time and energy. It would be impossible to calculate, for example, the hours spent transcribing the participants' interviews and then reading and rereading them. Each time I studied the data, another facet or view of the secretaries' reality presented itself. Many times I felt as if I were in a garden maze that kept opening onto more intricate and more intriguing avenues, pulling me deeper and deeper. However, by late February, five months after the study began, I realized that the data was recurrent. That is, no new or unrepresented information was forthcoming. It was time to start writing.

I began by writing the chapter on lawyers as clerical support because it seemed to contain the most vivid evidence. I wanted to see it on paper immediately; to me it was visual and concrete proof that this long-term process had resulted in something I could see and touch. As I was completing the chapter, I became ill unexpectedly and did not work again on the study for some time. When I returned to it, I found that the period of convalescence had given me time to think about aspects of the

study; time that otherwise I would not have had. The completed study has benefitted by that period of contemplation and reflection and has, I believe, resulted in a fuller, more thorough analysis.

Conclusions and Recommendations

Word Processing Training at Chase Bedford

Chase Bedford represented a law firm that was attempting to address the word processing training needs of its staff. For the most part, and in a rudimentary sense, its training worked. There were, however, problems with recurrent word processing inefficiencies, such as unwarranted, secretarial-caused revisions, that more effective training could have alleviated. Opportunities to utilize the full range of the software's capabilities were missed because many of the staff were either unaware of them or did not know how to employ them. The links between training, efficiency, and profitability were not recognized fully at Chase Bedford.

A Good Training Plan

A good training plan is the result of dedicated effort and commitment. It does not occur by accident.

> Where training for information technology is concerned, the best training programmes pay attention to advanced planning and detailed analysis of trainee needs, go beyond mere technical skills like keyboarding, and permit hands-on experience with trainee-paced learning. The best organisations also take responsibility for information technology training, see training as investment not cost, co-ordinate with external training providers, and continuously review and update training needs, courses and methods in order to optimise returns from future systems developments (Willcocks & Mason, 1987, pp. 63-64).

Chase Bedford provided a few of the "best training" attributes described above. The word processing manager delivered some kind of basic training, and some elementary learning occurred. Hands-on learning occurred through the use of a trainee-paced instruction manual. There was some attempt at remedial, review learning in the form of the supplementary training classes.

Chase Bedford relied on an in-house, former-secretary trainer to design and deliver its training program. It did not consult with external trainers or adult educators. There was little evidence of any substantial financial commitment for continual review and updating of training needs, courses and materials, such as the training manual. The general training plan had a technical and mechanistic orientation. It centered on the equipment and the software as a process, and subordinated the people to that process.

Needs of the Learners

As set out above, there was self-paced training in the form of the vendor-supplied, introductory WordPerfect lessons. American-oriented examples and exercises were used throughout these lessons. Some of the staff criticized that feature and found it irrelevant to their setting. Out of the two-and-one-half days that were allotted to introductory training, one-and-one-half days were devoted to "learning the system," which included both WPM and the 20 beginner's WordPerfect lessons. One-and-one-half working days are roughly equivalent to 10 hours. That amount of time is not long enough to achieve competence in either WPM or WordPerfect, let alone both. The WordPerfect lessons alone cannot be

completed with any degree of thoroughness in 10 hours. The afternoon of Day Two of the introductory session was devoted to practise exercises, and the final one-half day was used at the discretion of the word processing manager if extra training was needed for some trainees. At the end of the training period there was no attempt by the word processing manager to ascertain how far the trainees had progressed in the materials, or how comprehensive their understanding of the procedures. The trainees were neither instructed nor encouraged to complete the lessons on either their own or the firm's time. Instead, they were left to their own devices.

The introductory training was not thorough and comprehensive. I observed that trainees forgot many of the procedures they learned and did not have time to learn all that they could. The supplementary training was intermittent and inconsistent. Based on 12 years of experience as an instructor in a legal secretarial program, I feel the minimum time allotted for training a word processing software should be 24 hours. This period should not also include another software package, such as WPM. As well, a 24-hour introductory course should be followed by a regular schedule of review and supplementary instruction within a week of a secretary's commencement of job duties.

In the introductory training I observed, the three trainees had very different needs. They had different learning rates, different motives for attending, and different levels of skill. The trainee who had the most difficulty learning the system had the longest and the most varied computer experience, but no prior knowledge of WordPerfect. The others, younger and less experienced, had relatively little difficulty, but they

both had some prior knowledge of WordPerfect. In spite of these differences, the training was delivered in the same manner for all. One trainee needed a great deal of individualized attention to guide her through the complexities of the WPM. Yet she received the same amount of one-to-one tutoring as the others. Chase Bedford's training manual was written for learners with no computer skills, "zero starters." The manual did not address the needs of people with some experience who had crossover skills and selective "unlearning" to do.

Training Center - Physical Site

The training center was a small, cramped area that had too many doorways producing interruption and disruption. It was essentially a thoroughfare leading to the word processing manager's office and the computer room. Common staff intrusions included the office manager, the receptionist, and accounting personnel leaving messages, or asking a "quick question." Systems personnel also used the center as a means of entry to the computer room. These interruptions showed a lack of respect and value for the training process, including what should be the inviolate nature of the classroom. Given the troubleshooter's inability to see "telling" as "teaching," it may be that the staff failed to see the training center as a classroom at all. Whatever the reason, the underlying message was, "Excuse me, but my reason for interrupting you is justified. The 'real work' must get done in spite of what's going on in here." Training effectiveness could improve if the center were located in a dedicated, secluded space that reflected a sense of respect for and commitment to learning.

Training Center - Equipment

The existing three terminals and keyboards were insufficient. Introductory training was limited at any time to three trainees. Supplementary training could accommodate six persons due to the word processing manager's practise of asking people to sit two to a screen. For the most effective training, there should be a terminal and a keyboard for each trainee. If there is a legitimate need for large supplemental training classes, then adequate equipment and space should be provided, or the training should be conducted outside the firm.

There should be at least one printer in the center. Preferably, this should be a laser printer as this is the standard toward which the firm is moving. Considerable time was devoted in the introductory training to the operation of printer macros resident in the system software. These macros supported the use of laser printers. Chase Bedford was moving away from daisy wheel and dot matrix printers as these printers could not provide the flexibility the firm required in the printing of its documents. The inconvenience and disruption caused by the trainees walking across the hall to the printer station was not worth the money saved by failing to install a training center printer. More effective training could occur if the center had its own laser printer.

The whiteboard used by the word processing manager was located behind the trainees when they were seated at the terminal. Due to its small size, valuable information was frequently erased to make room for more notes. It would have been to the trainee's benefit to have had a

larger whiteboard that allowed incremental progression of lecture notes or keystroke routines to accumulate and remain in view.

As Joanne lectured, she often referred to her copy of the manual notes. In order to do this, she laid the notes on a chair between her and the trainees. This added to the congestion in the room, as well as decreased her teaching effectiveness due to the difficulty she had following her notes in this awkward position. She frequently lost her place. A lectern would have been suitable and helpful.

The workstations should be situated so that when the trainees are facing their terminals, they also see both the trainer and the whiteboard. When the trainer lectured or demonstrated, the trainees had to swivel their chairs away from their terminals in order to see her and the whiteboard. The training process could benefit from a more thoughtful placement of equipment.

The Training Manual

Each trainee in the introductory word processing was required to create personal reference notes and jottings. This was not always possible within the constraints of the training time and the forced-usage feature of the system that prevented trainees from taking extended time to make substantial notes. Also, it was too optimistic to assume that each trainee was capable of generating working notes of a quality that would withstand the pressures of the job. One of the introductory session trainees confided that she had photocopied many notes belonging to a co-worker. There should be a standardized quick reference of WPM

instructions prepared for each staff member. In addition, the training manuals should be pre-assembled with tab inserts.

New WPM Training Manual

Three of the seven participants felt that the introductory training session did not address WordPerfect in sufficient depth, but concentrated on WPM because of its complexity. They also stated that the information in the WPM section of the manual was written in a manner that was hard to understand. Joanne, the word processing manager, agreed with their assessments and related that she was writing a new version of the WPM training. She was doing this on her own time and, as a result, the new WPM instructional notes had not been finished. The firm could consider release time for her to complete this task, or it could hire outside consultants to accomplish it. Either course of action would be a positive step towards achieving more effective learning.

Role Conflict - Word Processing Manager

Role conflict existed between the word processing manager's administrative duties and her training duties. Some of the training sessions I observed started late because Joanne had phone calls to complete, or errands to run to the systems or accounting departments. She completed administrative tasks under the guise of letting the trainees practise on their own. She was expected to juggle two very distinct jobs that were each responsible and time consuming. It is to her credit that she performed her training role to the level she did. Her role as trainer should be augmented by a support trainer who could relieve her of some of the pressure and time constraints.

Role Conflict - Troubleshooters

The troubleshooters experienced role conflict by being expected to serve two masters. They supported the lawyers for whom they worked, as well as the secretaries to whom they gave advice. They were also expected to provide regular printer maintenance. It is likely that neither role received their full attention and talents. Considering that there were over one hundred support staff at Chase Bedford, there should be at least one full-time training assistant-troubleshooter who would report directly to the word processing manager.

Training Summary

The word processing training at Chase Bedford was rigid, controlling, and process specific. It was centered technologically around keystroke commands. Trainees were expected to comply with and accommodate the system design; it did not accommodate them. The word processing manager attempted to meet the trainees' needs by reassurances such as, "Please, call me!", "That's a good idea.", and "Absolutely!" She acted as a bridge between the firm and the secretaries, and the word processing training she provided served as a vehicle to inculcate the firm's values and goals.

Training would be more effective if greater emphasis were placed on conceptual knowledge. Training for technical skill is necessary, but the system would be utilized more thoroughly if the secretaries understood basic computer principles.

Electronic Peer Pressure

A distinct form of computer monitoring at Chase Bedford involved secretaries who revised and edited their co-worker's output. If inappropriate or inefficient keystroke routines had been used, the task of revising became time consuming, inefficient and stressful. Not-so-subtle pressure to conform to a standard was applied on the maverick secretary by peer secretaries, the troubleshooters and the word processing manager. Considering this phenomenon from an organizational viewpoint revealed a number of issues.

Secretarial Reporting Procedure

An informal secretarial pecking order was created by the reporting procedure. When a secretary encountered inaccurate or inappropriate keystroke entries, she had two choices. She could do the revisions which were protracted because she had to correct inappropriate keystrokes by the originating secretary, thereby taking longer than necessary. She then ran the risk of having her lawyer think she was technically incompetent because of the delay. If this situation occurred often, she could receive an unwarranted poor performance review.

Alternately, she could inform a troubleshooter about the problem and request that the originating secretary be instructed in the proper methods. If the originating secretary was a repeat offender, this solution was the most appropriate socially. Using the troubleshooter to intervene saved the revising secretary from direct confrontation with the originating secretary. If a troubleshooter was unable to effect a change in the originating secretary's procedures, the problem was passed on to

the word processing manager. The policy of having secretaries report each other created an unofficial, but powerful, network of secretaries who criticized and judged their co-workers. They monitored the quality of work on behalf of the firm; by proxy. This resulted in a situation where not only did the secretaries have to satisfy the lawyers they worked for, but they also had to please their co-workers. Fear of peer disclose and censure resulted. Subjective impressions of who was "good" or "bad" were not balanced by objective measurement until the word processing manager was called upon. By this time, it was all too apparent to the transgressor what had taken place. She also knew that a number of her peers were aware of her mistakes, and she felt embarrassed and experienced loss of face.

Standardization of Input

The cost of keystroke inefficiency was high. Duplication of staff time and effort occurred when correcting inappropriately made entries, and a decrease in computer system efficiency resulted. Human costs, such as loss of self-esteem and occupational pride, followed. Standardizing the method of keystroke entries could occur in greater measure if the firm's introductory word processing training was broadened and strengthened. A more basic and more thorough training program is needed if there is to be a commonality of input methods and techniques.

Secretarial Team Concept

The nature of open access to the system requires consistent word processing style if the system is to reach its potential efficiency. The goal of an efficient process dictates that the secretaries should work as

team members to achieve consistent technical style. This counters the traditional, independent locus of lawyer-and-secretary as the primary unit. The secretaries at Chase Bedford had not yet perceived that they were a team unit. They may have been working in the traditional model whereby secretaries assumed absolute ownership and responsibility for their documents and saw the lawyer they work for and themselves as the only important dynamism. They should be encouraged to see a new perspective; one that includes them, collectively, as another team unit.

White Collar Creed: Self-Determinism and Self-Assessment

The legal profession is considered to be "white collar." The term refers to people who put information and knowledge to work rather than physical strength or manual skill. White collar workers have long defended the principle of self-determination of goals and self-assessment of performance (Drucker, 1986, p. 133). This creed is evident in the legal profession; lawyers are not scrutinized or assessed by any regular, externally imposed measure of productivity. They allow their legal secretaries a similar privilege.

By implementing its new computer system, Chase Bedford changed its traditional methods of law office administration. To maximize profit, its computer system required conformity of word processing procedures by all staff. If word processing training were expanded to include regular, repetitive performance assessment, then the training process could act as a impetus for achieving conformity. The goal of achieving conformity was jeopardized by the secretaries' belief that the white collar right to use

the system in an individualistic and unappraised manner also applied to them.

Conformity to standardized word processing practise at Chase Bedford may be a necessity in the future. This conformity would require measurement by quantitative, objective testing as well as system monitoring. Objective means of assessing performance in order to identify and meet training needs would be required if the firm is to obtain the maximum benefit from the computer system.

Lawyers as Clerical Support

Why Are Lawyers Typing?

As this study progressed, I was struck by the phenomenon of seeing orthodox, tradition-bound lawyers sitting at keyboards and actually typing. Of all the professions, lawyers are among the most conservative and cautious. As a practising legal secretary in the 1960s and 1970s, I had never seen a lawyer lay a finger on a keyboard, let alone routinely input or revise documents. Surely what I was now seeing was heresy! Whether the behaviour I observed was called typing or keyboarding was irrelevant. Watching lawyers deviate from almost a century of established keyboard avoidance was perplexing. Why were they doing it? What force was strong enough to entice them into an area that was so mechanistic and lockstep that for years they had paid others to relieve them of its burden?

I had more questions than answers and I still do. Some of my inquiries led into areas that are not easily researched, categorized, and labelled. Why, for example, have lawyers begun to type, to word process,

and to claim keyboarding skills as their own? How did they elevate the keyboard from its secretarial-and-lower-status into their own rank? How did they unbundle the master-servant task status that predominates in law offices and willingly perform what has been traditionally clerical work?

Professional Status. It became clear through observation and study that the increasing number of lawyers who word process have one thing in common. They now perceive that operating a computer terminal, no matter what the task, is a professional-status endeavour. They have unbound the context that links keyboarding to secretaries solely and have created a new context that imparts professional standing to keyboarding skills when performed by lawyers. Lawyers have appropriated the process into their domain.

Possible Underlying Rationales

Independence as a Philosophy. Some observers might conclude that lawyers who word process are only an example of the effects of change, to be analyzed from an organizational development framework. In some analyses they would be correct. I contend, though, that one of the most influential bases of this phenomenon might be in the popular belief in self-sufficiency promoted by the 1970s so-called "me-first" generation. This concept holds that the individual is all important, and before one can satisfy the needs of others, one must satisfy one's own needs. This is accomplished by an independent reliance on one's abilities and skills to achieve success. This philosophy continued into the 1980s under the rubric of "yuppies." People who are classified as "young urban professionals" are excessively preoccupied with satisfying their needs by acquiring the material trappings of status and wealth. This independent

and me-first philosophy also operates in the workplace and can become a governing factor in the value structure of any enterprise, law firms included.

Computer Craving. Another analysis centers on the compelling, seductive attraction of the computers themselves. Many people report that they feel a "kick," a "high" when working on a computer. The notion of computer addiction comes to mind; perhaps the computer has become an end unto itself. Whatever, computers enable self-gratification and self-competition, appealing reasons to want to operate one.

Individualism. Law firms are primarily a conglomerate of professionals loosely associated for the principal purpose of practising law. They are able to maintain their individual practices because they are associated, in an organizational sense, to share overhead costs. Generally, an individual lawyer's law practice and commitment to his or her clients takes precedence over most other considerations in the law office. In a 1987 national associate survey, 64.49 percent of surveyed lawyers replied that they had complete independence and responsibility in client matters, except for major decisions (Crawford, 1988, p. 9). It is not surprising, then, that this sense of individualism should extend to work practises, such as electing to keyboard or type on a computer where and when opportunities arise. Computers provide just such an opportunity because they were designed to allow even a relative amateur to process documents easily, quickly, and cheaply. It may be that this is one of the reasons that some 12 percent of the nation's lawyers are choosing to word process.

Female Lawyers - Increasing Numbers. Women are entering the legal profession in unprecedented numbers. In 1971, there were 860 women employed as lawyers and notaries in Canada. In 1981, that number increased to 5,390 and by 1986 there were 9,410 women lawyers (Statistics Canada, 1989, p. 15). Women's share of employment in the legal profession between 1981 and 1986 rose from 16 percent to 22 percent. This may mean that females who were educated and socialized to type are setting the tone and providing an example for males who were educated and socialized not to type. These women lawyers may possibly be giving legitimacy to the tasks of typewriting via computers. As well, the competition between male and female lawyers, and among lawyers regardless of sex, may be providing a further impetus that is encouraging more lawyers to use word processing.

Female Secretaries - Decreasing Numbers. Women are leaving clerical occupations in unprecedented numbers. As well, young women who traditionally would have chosen clerical and secretarial work are now finding employment in non-clerical occupations. They are avoiding secretarial jobs altogether, and there is a critical shortage of legal secretaries (Metcalfe, 1988, p. 38). Taken together, this means that there are fewer women who are willing to be secretaries and, therefore, fewer women to be legal secretaries. This may be another reason why lawyers are doing their own word processing.

The effect that this task reversal will have on the legal secretarial role is yet to be determined. This finding indicates that, because of lawyers' use of computers for tasks formerly the responsibility solely of their secretaries, job restructuring could be eminent for all staff, whether support or professional. This study concerned itself

solely with the impact of this finding on legal secretaries and did not attempt to assess the effect on lawyers or other support personnel, such as legal assistants or paralegals.

There is need for further study of legal secretaries in law firm settings. A lack of knowledge exists regarding much of their workplace realities and the types of specialized jobs they perform. Research should be conducted to investigate these areas. The impact on legal secretaries' careers by lawyers who word process should also be investigated. Specialized programs for legal secretaries at colleges and private schools should adapt their programs to reflect the changing realities of the law office.

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CHAPTER 6

SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

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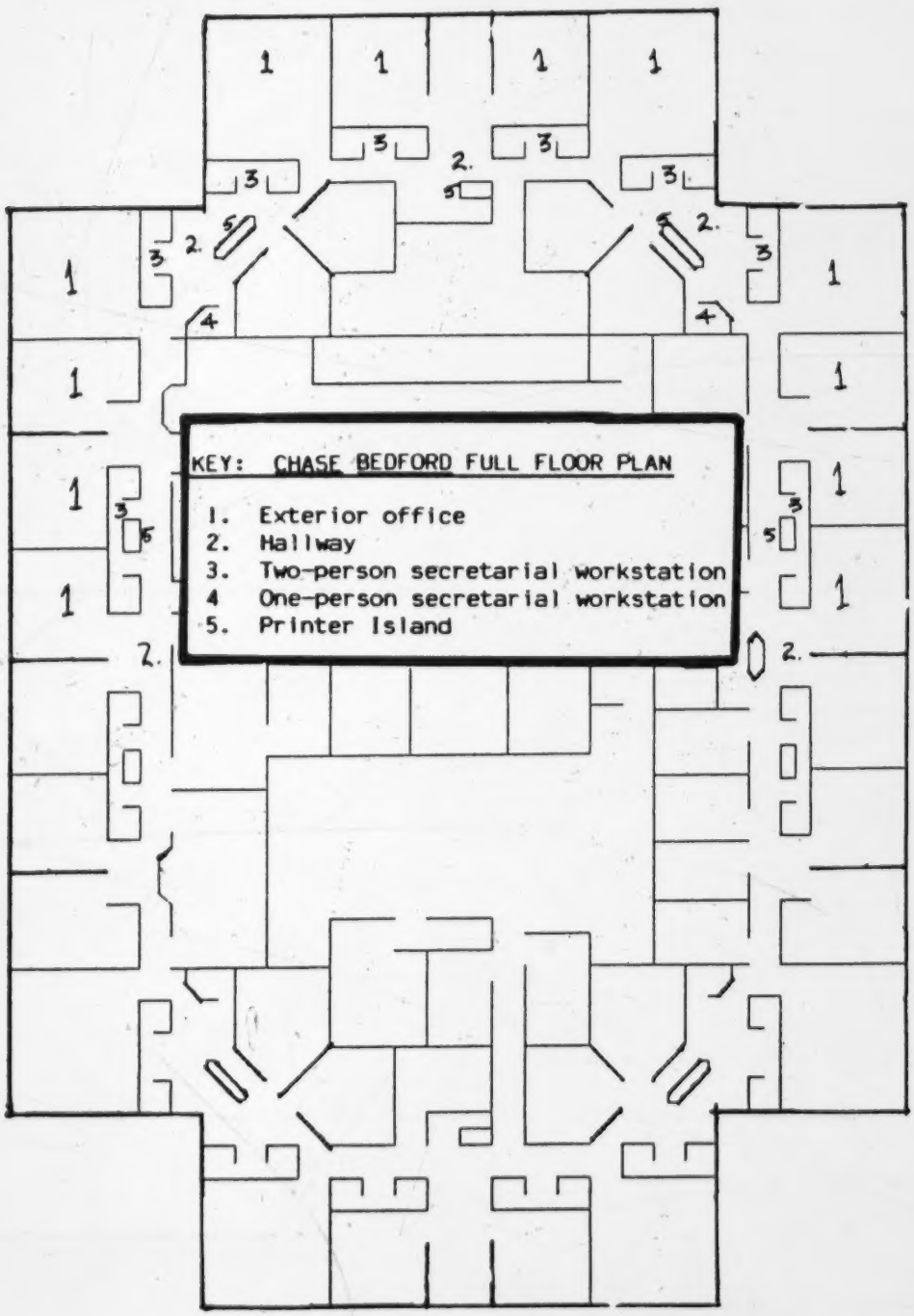
APPENDICES

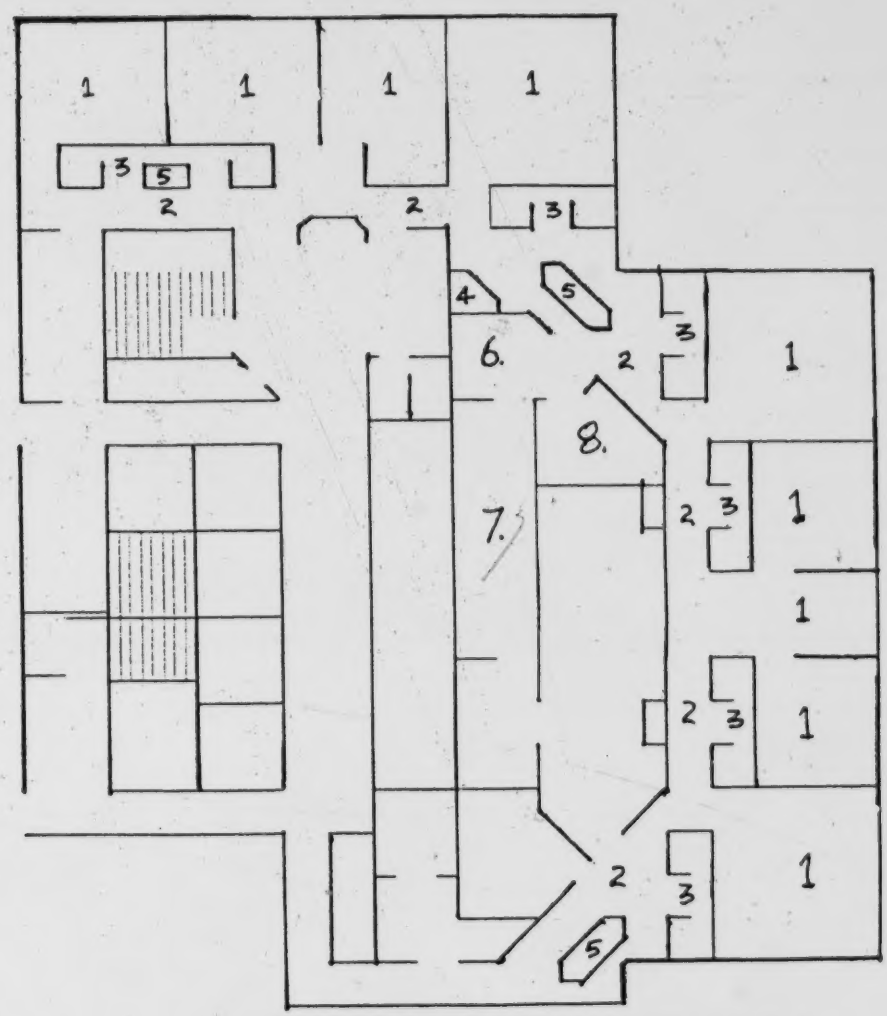
APPENDIX A

Computer-Drawn Representation
of the Layout of One of the Complete Floors
at Chase Bedford



APPENDIX B

Computer-Drawn Representation
of the Training Center and Immediate Area



KEY: CHASE BEDFORD TRAINING CENTER
AND IMMEDIATE AREA

1. Exterior office
2. Hallway
3. Two-person secretarial workstation
4. One-person secretarial workstation
5. Printer Island
6. Training center
7. Computer system room
8. Word Processing Manager's Office

APPENDIX C

Schedule of Field Visits

1988

October	04
	12
	16
	19
	21
	25
	31
November	07
	08
December	05
	07
	15

1989

January	25
	27
February	01
	09
	10
	15

APPENDIX D

Schedule of Participant's Interviews

October 19, 1988 - Office Manager

October 25, 1988 - Word Processing Manager

December 08, 1988 - Secretary A

December 12, 1988 - Secretary B

January 12, 1989 - Secretary C

January 26, 1989 - Secretary D

February 01, 1989 - Secretary E

February 13, 1989 - Secretary F

February 15, 1989 - Secretary G

February 17, 1989 - Word Processing Manager

APPENDIX E

Sample Interview Guide

Questions

1. What's it like to use WordPerfect on the job?
2. What do you remember about the training sessions?
3. What ways would you train differently next time?
4. What ways would you train the same next time?
5. How helpful was the yellow binder during the training sessions?
6. How helpful is the yellow binder on the job?
7. How does WordPerfect affect your:

   working conditions — job content/patterns
   salary — working hours
   workload — physical state
8. Do you get any help from the wp supervisory staff?
9. How often do you need the troubleshooter?
10. Are they secretaries, as well as being troubleshooters?
11. How often do you need the wp coordinator?
12. Tell me about the advanced training sessions.
13. Is your job still needed?
14. Will that change?
15. What new skills (other than WP) did you need to learn?
16. What skills (other than WP) do you no longer need?
17. What parts of your job are changed by the use of WP?
18. What gains did you experience?
19. What losses did you experience?
20. What do you like about the new system?
21. What do you dislike about the new system?
22. E-Mail and Calendaring
23. Do you think the new system was needed?
24. Does the new system work well for you?
25. Are you evaluated differently because of the new system?
26. What are some of the biggest effects this system has had on you?

APPENDIX F

Sample of Interview Transcript

• system has open access

• team work
- lawyers to lawyers
- secretaries to secretaries
- lawyers to secretaries

the litigation end of it. They all take on, uh, files together because there's court work involved, and so it helps out. So you can, uh, there can be two or three different secretaries working for these different lawyers..lawyers, and you can go back into the system and draw up anybody's letter or document and make revisions or..or whatever, so it's..it is handy that way, too. It's not all in, uh, on a disk, or whatever. You don't have to..you can just bring it up very quickly.

L: When you walked in that first day on your first training session,..

4: Mmm, hmm.

L: ..did you know WordPerfect software?

no WordPerfect experience

4: No, I didn't. No, I'd never worked with WordPerfect before. So, uh,..nor had I'd ever been on a, a, you know, a mainframe like that where everything's into..in one system.

L: How did you find the training session then for training on WordPerfect?

• Training

- more WordPerfect training needed
- not enough time to learn WordPerfect
- introductory session should be longer

[See Secretary B Dec. 12 p.4, line 6 p.38, lines 1-4

4: Yeah. Um, (pause), I thought, actually, I felt that it was, um, skipped over quite a bit. I didn't..I thought it was done, um, in a very short period of time. Like, I don't know if everyb..I think everybody..I'm not sure if everybody feels the same way, but, uh, I felt that a little more time could have been used to, uh, explain things. Um, (pause), I guess there's pros and cons to that. I can see where you can become bogged down with too much information all at once, or, uh, or if they could spread it over, uh, you know, another day or whatever. But, like the actual Word, um, Perfect part of it, uh, she just really touched down on a few things and, uh, you..you..you know, I think you have to really.. As you go along, you find more things that you can be doing. Uh, so it was rather quick. You know, there was so much to

APPENDIX G

Sample of Computer-Generated Field Notes

October 19, 1988

- process specific
- authority
- control

I spent the rest of the morning going through a file of Joanne's most recent memos that she has sent to the staff regarding wp matters.

The following are my on-site notes relating to those memos.

- technology specific
- military terminology

Undated but stored between memos of May 16, 1988 and May 20, 1988, page 2: "When you are in printer control be sure that you do not disable or kill a laser. There has been an epidemic of lasers being disabled. Only the troubleshooters should be killing or disabling with the exception of working with forms names as described in the advanced training manual."

Page 3: "Correct procedure for naming a document is: E. Lawyers Initials.Document Number.Document Type"

- technology specific
- rigid
- controlling
- management exhorts lockstep behavior

Page 3: "Everyone needs to follow the correct procedures. A lot of time and effort was spent in designing our system. The system is not running to its fullest yet (i.e. automatic archive and delete, searching on document types to name just a few) but when all of this is in place if everyone is doing their own thing all of the extras the system is capable of performing wil be useless."

Page 4: "Please delete as many document masters as you can at all times to keep the system clean. To do this do a find at the document master and answer yes to delete three times." "What is everyone doing with precedents?" "Has anyone had trouble locating a document on the system since we have converted?" "Are there any problems with working on documents that someone else has put into the system?" "What other types of training would you like to see?" "What functions give you the most trouble?"

- use of peer pressure
- humanistic approach to a technological goal

APPENDIX H

WPM Training Manual
"Create a New Document Master"

1. Select "W - Word Processing Management" from the Library menu.

   The "Document Master" screen appears.

2. Select "Add"

   Note that "Enter the document number of a template record: _____" appears.

   Enter a document number as the template and press **<NEW LINE>** (only use a template if you are working on the same file)

   OR

   Enter 0 and press **<NEW LINE>** if you do not wish to use a template. If the template field is blank, you may press **<NEW LINE>**.

   Note that the cursor appears in the first field you will enter for the document master.

   The following are available if you type a mistake while entering the document master:

   (1) While in the field, use the cursor keys and the DEL key, and retype the information.

   (2) At the option line, select "Chg" to modify the fields in the document master.

   (3) While in a field, press **<SHIFT F11>** to move back a field.

3. Enter the document type and press **<NEW LINE>**

   If you do not remember which document type code to enter, or if you would like to see a list of all document types, press **INDEX LOOKUP <F2>**. You may then select "Beg", to list document types starting with the letter A; or you may select "Find" and then enter the document type to begin listing from.

APPENDIX I

Memo from the Word Processing Manager to the Secretaries

While working in WordPerfect you may want to quickly exit your document. Following is a description of quick exits, how they affect charges to the client and how to quickly go back into your document. You will not be able to work on another document or exit off the system to AOS/VS (i.e. lunch) when using the "hot" keys.

As usual please let me know if you have any questions.

1. This first exit is excellent not only if you want to stop charges while you are on the phone, making copies, etc., but also if you are working in a document with a keyboard merge and want to exit but not cancel the merge:

   Press Home W to take you back to the Revise Screen the clock will stop ticking;

   To go back into your document answer how many pages you printed;

   Press N to answer is the revision finished and choose option 2 to go back into your document; **DO NOT USE SHIFT F15 TO RETRIEVE OR YOU WILL LOSE YOUR CHANGES; WHEN YOU ARE FINALLY FINISHED WORKING ON YOUR DOCUMENT YOU MUST REMEMBER TO PRESS F15 TO SAVE AND EXIT THE DOCUMENT.**

If your document contains a keyboard merge when you go back into it the cursor will go back to where you left off, type your text if any or press F9 to continue the merge.

The next three quick exits will NOT stop the clock from ticking. Your client will be charged for all time until you exit as in #1 above or by the save/exit F15 key.

2. Home E will take you directly to E-Mail, the clock is ticking and your client is being charged;

   Home Z will take you back to your document; or